



**P F S**

# EXPECTATION VS. REALITY

Is sustainability sustainable?

A CONSCIOUS COMMERCE REPORT

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# Introduction

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As the events of 2020 unfolded, consumers felt the impact socially, environmentally and financially, and became more aware of their spending and the direct impact their shopping habits have on the environment. This latest research explores these impacts and unpacks some of the challenges to accomplishing sustainability goals for both retailers and consumers.

Expectations from today's shopping experiences – both on and offline – have changed significantly in recent years, driven by the global pandemic and the impact of Brexit in the UK on consumer buying habits. The influences affecting what consumers buy, and how they buy it, have grown exponentially – from cost and speed of delivery, right through to the sustainability of products and brand values (figures suggest that 81% of people now prefer to buy from sustainable sellers).

## With so much shaping the purchase process and consumer attitudes today:

1. What is the priority for consumers and how can brands get it right?
2. What impact is the desire to shop sustainably and ethically actually having on consumer actions when it comes to making a purchase?
3. Are these desires enough on their own to encourage consumers to make sustainable choices?
4. Is there still a gap between what consumers feel about shopping sustainably, and what retailers are doing practically in this area?

## Three C's to sustainable sustainability

To understand the attitudes and aspirations on both sides, we asked consumers and retailers for their thoughts on what is driving purchasing decisions. The results of this study make it clear there are three key considerations for retailers seeking to implement sustainable sustainability: **cost**, **convenience** and **choice**.

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### Patrick Lowe

Area Vice President of Business Management at PFS

Applying his extensive knowledge of eCommerce solutions across verticals, Patrick helps leading brands and retailers solve their business problems, reach their eCommerce goals, and adapt to an increasingly digital retail environment.

As sustainability concerns have become more pressing for consumers and retailers alike, Patrick has driven PFS' development of sustainable solutions that enable retailers to establish and meet social and environmental commitments. **Catch more tips from Patrick in the "Expert Insights" following each section of this report.**

# Methodology

PFS commissioned independent market research agency Arlington Research to survey 4,000 adults about their expectations from brands when it comes to sustainable practices. Nationally representative interviews were carried out with adults aged 18+ with quotas set on age, gender, and region at a country-wide level. Respondents came from the UK (2,000) and the US (2,000).

To compare the attitudes and expectations of consumers with the actions and aspirations of brands, 200 interviews were also conducted with those working for retailers or consumer brands selling direct to consumers online, or via online marketplaces. Annual sales revenues of these businesses were more than £10.5 million (or over \$15 million). Respondents were director level or above, working in customer experience, customer service, eCommerce, operations, supply chain or C-suite roles.

Where appropriate, the following age groups are referred to within the report:



### Generation Z

respondents born between 1994 – 2001



### Baby Boomers

respondents born between 1946 – 1964



### Millennials

respondents born between 1980 – 1993



### The Silent Generation

respondents born before 1946



### Generation X

respondents born between 1965 – 1979

To compare shopping habits among those with different priorities, the research also classified shoppers into different personas based on their most important considerations when making an online purchase of a leisure or non-essential item (excluding groceries):



### Price conscious shoppers

(20%) – getting the best price even if it means buying an unknown or less well-known brand



### Practical shoppers

(33%) – researching and comparing alternatives to ensure I am buying the best option for me



### Ethically-motivated shoppers

(10%) – purchasing a sustainable product even if it means paying a bit more



### Emotional shoppers

(9%) – making a purchase to enhance my mood, feel inspired or reduce boredom



### Brand-driven shoppers

(22%) – buying from a specific brand that I trust and have purchased from before



### None of the above

(6%)

# Key Findings

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## High-level insights



Desire among consumers to shop more sustainably and ethically has risen in recent years. However, sustainability management in online retail still has a way to go



The added expense of providing a choice of delivery and packaging options is the main reason holding retailers back from offering more sustainable choices for consumers



Despite strong sustainability ideals, consumers are still battling with balancing cost versus conscience when it comes to purchase decision-making, with the 'higher cost of sustainable products' a barrier for consumers



When it comes to customer returns, there is a discrepancy between the level of returns retailers receive and consumers' claims about how often they return goods



## Key retailer findings

68%

Agree their customers are more conscious of how online shopping impacts the environment than they were before the COVID-19 pandemic

59%

The added expense of multiple delivery and packaging options is the main reason they don't offer more sustainable delivery and packaging options

73%

Believe multi-national brands have greater opportunity to create a positive impact than smaller brands but often do the minimum required by regulators

64%

Offer a choice of delivery and packaging options, and 74% offer sustainable packaging or shipping options without passing on the cost to customers

18%

For retailers who believe their average customer would pay more for sustainable products, they expect them to pay a minimum of 18% more

46%

Agree their customers generally over-purchase and return unwanted items, vs. 26% of consumers who agree they do this

64%

Agree their customers prefer to have multiple options for returns (return to a store, return to a neutral drop off location, ship it back, etc.)

60%

Believe most of their customers have never considered the environmental impact of online order returns vs. 47% of consumers

## Key consumer findings

48%

Are more conscious of how their online shopping behavior impacts the environment than they were before the COVID-19 pandemic

54%

Would support and shop with brands committed to carbon-reducing delivery options, even if the delivery timescale is longer, over brands that do not

67%

Say buying sustainable product is important, but so is paying the best price which may be found at online marketplaces or retail giants, such as Amazon

35%

The higher cost of sustainable products is the top reason holding consumers back from making more eco-friendly purchases

55%

Base their purchasing decisions on convenience and cost over sustainability and concern for their impact on the environment

38%

Agree free returns encourage them to over-purchase items as they know they can return them without additional cost

31%

Say 'a more detailed sizing prediction' would encourage them to return fewer products purchased online followed by 'a more detailed product description on the website' (29%)

53%

Free returns 'is the most important aspect of a company's returns policy' for 53% of consumers, with 46% of retailers offering 'free returns'

# Matching consumer desire with retailer realities

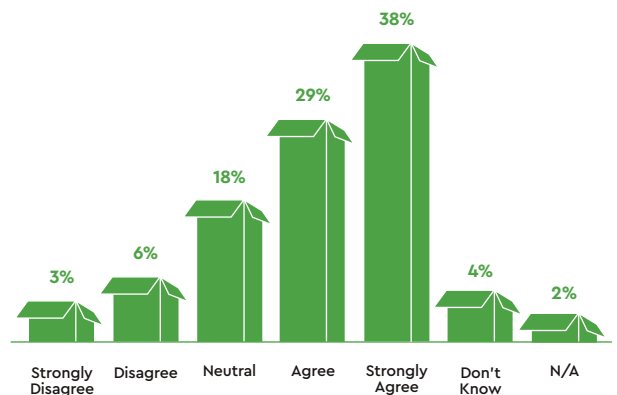
Desire among consumers to shop more sustainably and ethically has risen in recent years and the onus is now on retailers and brands to support them and provide a range of affordable options that match their ideals. According to our research, just under half (48%) of consumers are more conscious of how their online shopping behavior impacts the environment than they were before the COVID-19 pandemic. For UK consumers this rises to 49% – a 14% increase from when we asked the same question in 2020.

Interestingly, retailers and brands believe this to be a larger phenomenon, with almost 7 in 10 (68%) agreeing that their customers are more conscious of how their online shopping behavior impacts the environment than before the COVID-19 pandemic.

When we look at how this consciousness translates into consumer practices and expectations, it seems that shoppers have high hopes that retailers can support their conscience with sustainable packaging and delivery options. Over two-thirds of consumers (67%) agree that they expect all online retailers and brands to use recyclable and recycled packaging, rising to 76% in the UK compared to 74% in 2020. Over 6 in 10 consumers (63%) also agree that they would like to be able to choose a sustainable packaging option when purchasing an item.

**67%** of consumers agree that they expect all online retailers and brands to use recyclable and recycled packaging

Consumers expect all online retailers and brands to use recyclable and recycled packaging



The encouraging news is that over half of the retailers surveyed use 100% recyclable packaging (56%), and 58% offer carbon-reducing shipping. Interestingly, of those who provide 100% recyclable packaging, 48% don't believe consumers expect it.

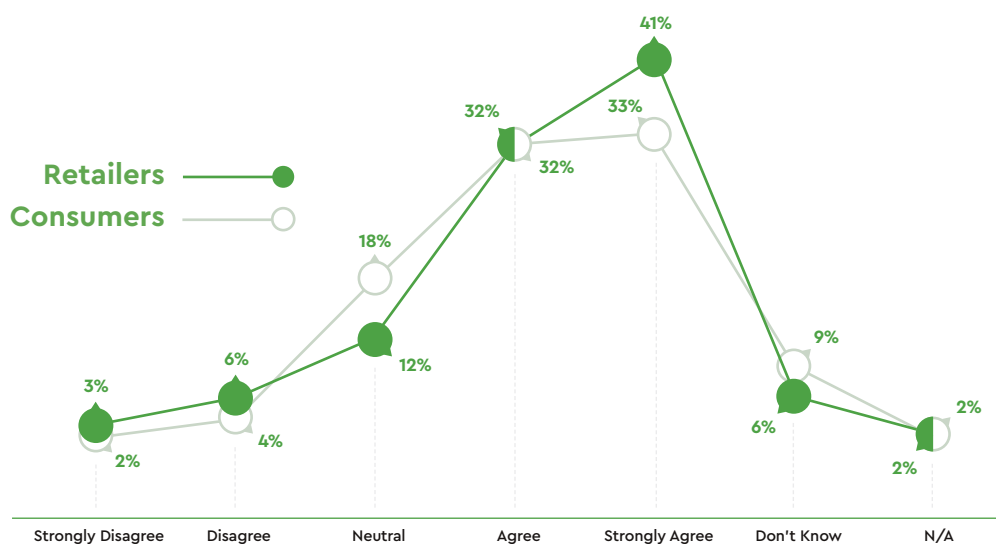
The role that retailers and brands play in supporting sustainability cannot be underestimated, but the efforts of big brands can often be seen to fall short. Almost three-quarters (73%) of retailers agree that multi-national brands have the opportunity to create a greater positive impact than smaller brands, but often do the minimum required by regulators. This rises to 76% in the US.

When it comes to consumers, agreement on this is lower but more UK respondents agreed (70%) compared to the US (61%). Almost 7 in 10 (69%) of 'informed, practical shoppers' and 'ethically motivated shoppers' agree with the statement. Instead, it is the smaller, independent retailers who are likely to be leading the way with genuine sustainability credentials – over two-thirds (69%) of retailers believe this to be true and over half of consumers (54%) agree.

**Almost three-quarters (73%) of retailers agree that multi-national brands have the opportunity to create a greater positive impact than smaller brands, but often do the minimum required by regulators.**

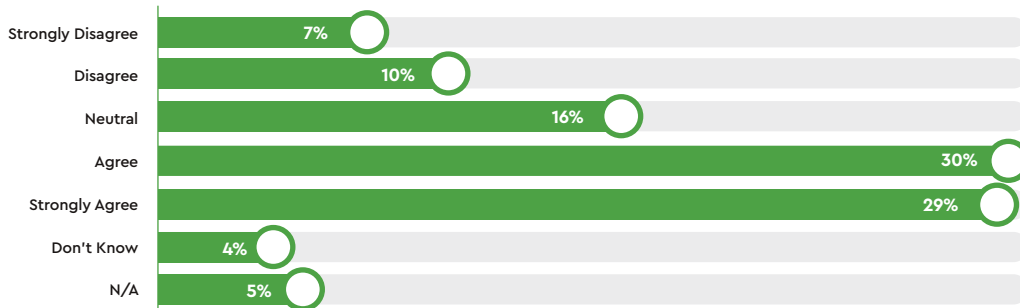
More encouragingly, almost two-thirds of retailers surveyed (64%) do offer a choice of delivery and packaging options, including more expensive environmentally friendly options, and almost three-quarters of retailers surveyed offer sustainable packaging or shipping options without passing on the cost to customers (74%).

**Large multi-national brands have the opportunity to create a greater positive impact than smaller brands but often do the minimum required by regulators**





## The main reason retailers don't offer additional, more sustainable delivery and packaging options is the added expense



On the flip side, the added expense could be beneficial for brand loyalty in the long run. Over half of consumers (54%) agree they would support and shop with brands who commit to carbon-reducing delivery options, even if the delivery timescale is longer, over brands that do not offer carbon-reducing delivery options, while only 46% of retailers believe this to be true of their customers.

Despite a gap in consumer desire and the actions of retailers and brands, the will is there with over 6 in 10 retailers (62%) agreeing their organization has made a commitment to corporate social responsibility (CSR) initiatives. Clear sustainability goals and initiatives form a huge part of shopper loyalty and perception, as many brands and retailers will attest to.



**54% of consumers agree they would support and shop with brands who commit to carbon-reducing delivery options, even if the delivery timescale is longer**

### Retailer example

## patagonia

*Climbing outfitter Patagonia has made sustainability a core part of its business strategy over the past 50 years – building a loyal following as a result. From voluntarily imposing a 1% "Earth tax" on itself in the 1980s to support grassroots environmental organizations, to donating 100% of its Black Friday profits (\$10 million/£7.2 million) to environmental organizations, Patagonia is constantly updating its initiatives to stay innovative and relevant, with sustainability at its core. Almost 70% of the brand's products are made from recycled materials, and by 2025, its goal is to use 100% renewable or recycled materials.*

For others, however, sustainability initiatives have been a slower burn with a lack of action and commitment often cited. For some of these brands consumer demographics play a part in the speed and success of such initiatives. For the most part, customers of large big box retailers are primarily price conscious – seeking a deal on a desired item. This is a different proposition to customers who specifically seek luxury or ethically based products. Therefore, the level of commitment from brands will be driven by their customer profiles, meaning it will not look the same for every outlet.

# EXPERT INSIGHT

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**Patrick Lowe**

## How can an omnichannel approach help close the gap and provide more workable and affordable options for sustainability?

Matching increasing consumer desire to be more sustainable is best achieved by retailers who provide their customers with choice. This is easier said than done. Retailers need to ensure they strike a healthy balance that empowers customers to shop when, how and where they want while eliminating any friction points that result in channel conflict.

It is clear customers share sustainable aspirations, yet struggle to commit, particularly when it isn't convenient. By offering multiple fulfillment options (i.e. two-day delivery, BOPIS, curbside pick up, local delivery, etc.), retailers can appeal to all types of shoppers, enabling them to choose the option that meets their preference for speed, cost or sustainability. Whether you are a digitally native brand or a store with an established brick-and-mortar presence, you should consider engaging both avenues in order to expand options and equip customers to choose how they shop.

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## How PFS can help

The complications around setting up an effective omnichannel operation can be daunting to retailers just getting started. PFS offers comprehensive omnichannel capabilities that enable seamless customer experiences across channels. From powerful distributed order management (DOM) technology that provides inventory visibility across stores and fulfillment centers, to store fulfillment solutions that equip your brick-and-mortar locations to support the digital channel without disrupting store operations, our omnichannel operations equip you to meet consumer demand for choice in the digital age.

## SUSTAINABILITY STICKING POINTS

# What's holding consumers and brands back?

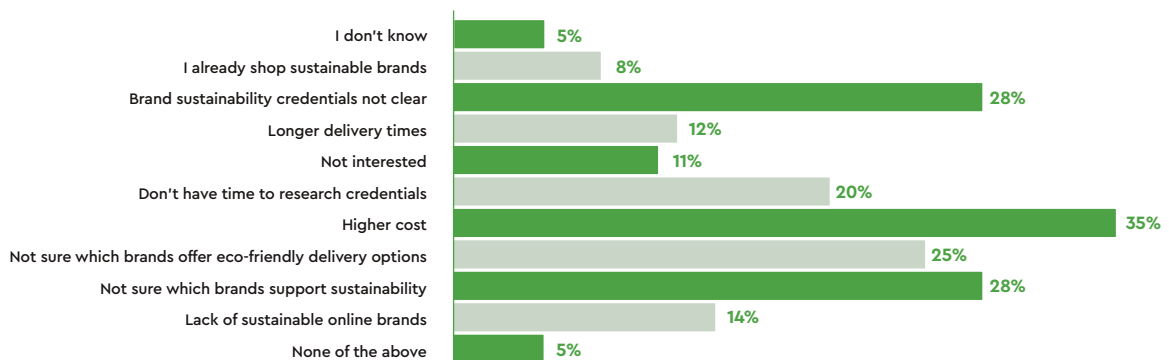
### Social media sway

It's clear that consumers want – and expect – to be able to shop more sustainably but there are a number of other key influences which can still outweigh ethical ideals. Competitive pricing, speed of delivery, and "fast fashion" – often spurred on by social media – can shift the balance and affect behaviors. You only have to look at how platforms such as TikTok and Instagram can influence shoppers and spawn related products and enticing promotions – including **TikTok leggings** – designed to sway shoppers. The lure of fast fashion and what's "on trend" is still a huge barrier to improving sustainable shopping habits.

### Marketplace margins and retail giants

Getting the balance right is not easy, with over two-thirds of consumers (67%) agreeing that buying a sustainable product is important but it is also important to buy it at the best price, which may be found at online marketplaces or retail giants, such as Amazon. In fact, cost is still one of the main sticking points when it comes to shopping sustainably: the top reason holding consumers back from making more eco-friendly purchases is 'the higher cost of sustainable products' (35%). And retailers agree with this as the top reason holding consumers back (47%).

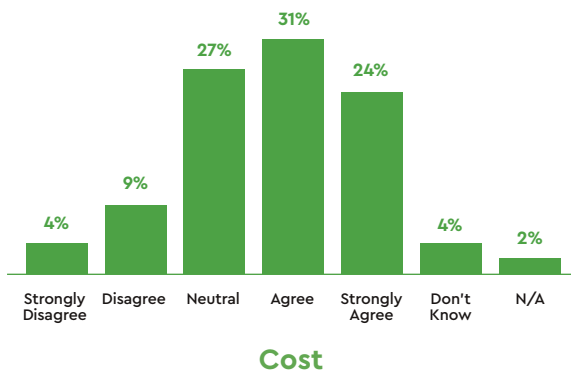
## What is holding consumers back from making more eco-friendly purchases?



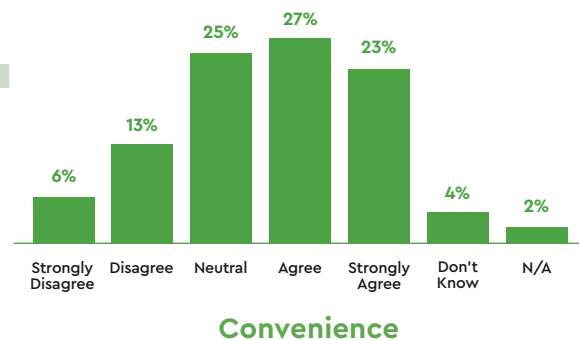
## Cost vs. convenience

Where cost is, convenience often closely follows. Over half of consumers (55%) agree they base their purchasing decisions on convenience and cost over sustainability and concern for their impact on the environment. For just over half of consumers (51%) fast delivery is the most important consideration when buying a product online.

**Consumers base their purchasing decisions on convenience and cost over sustainability and concern for their impact on the environment**



**Online, fast delivery is the most important consideration for consumers buying products**



These attitudes are certainly reflected in the wider retail picture, with Amazon's UK sales rising by 51% in 2020, suggesting that consumers are still not prepared to forgo the convenience of such eCommerce giants in favor of independent, more ethical retailers. Our research backs this up with just over 6 in 10 consumers (61%) agreeing they prefer to shop with marketplaces and online retail giants, due to product selection, competitive pricing and fast delivery when purchasing non-essential leisure purchases. This rises to 64% of Generation X. Almost two-thirds of 'price conscious shoppers' (65%) agree with this statement, followed by 64% of 'emotional shoppers'.

There is a tipping point for 'conscience versus convenience'. Retailers who can get the balance right through more affordable sustainable options which can still compete on speed, as well as those who offer greater transparency around their ethical credentials, will help turn the tide. If retailers can achieve this ideal, then our research suggests shoppers will be prepared to pay more for sustainable products .

**61%**

**of consumers overall agreed they prefer to shop with marketplaces and online retail giants due to product variety, pricing and fast delivery**



**64%**

**Generation X Shoppers**



**65%**

**Price Conscious Shoppers**

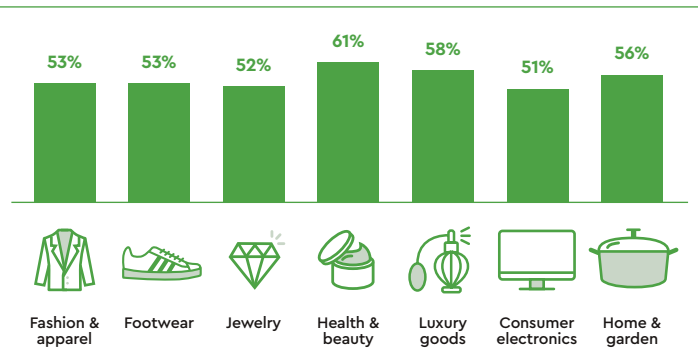


**64%**

**Emotional Shoppers**

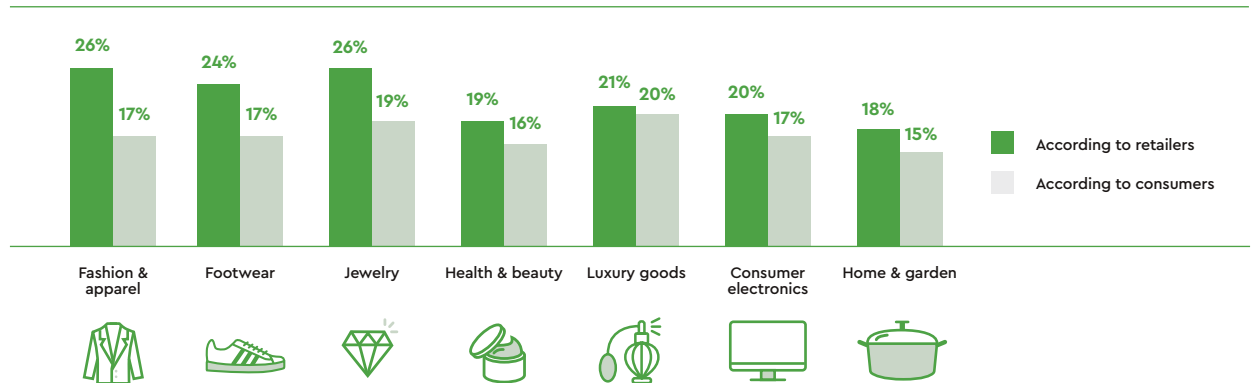
In fact, over half of category shoppers are prepared to pay more for products with sustainability credentials. Amongst those who are prepared to pay more, this ranges from 51% of those who are prepared to pay more for consumer electronics, to 61% who are prepared to pay more for health and beauty products. On average, consumers would be willing to pay a minimum of 15% more per category, per year for sustainable products, rising to 20% for luxury goods.

### How much more consumers are willing to pay per year for products with sustainable credentials



When it comes to retailers themselves, they also recognize the growing importance of this issue for customers, with over half (55%) believing that their average customer would be prepared to pay more per transaction for products with sustainability credentials. Amongst those who think their average customer would pay more, they believe the average customer would be willing to pay a minimum of 18% more – which is higher than consumers suggest. The will of consumers is there, but retailers need to help tip the balance.

### If a product has sustainable credentials how much more is/would a consumer/customer be prepared to pay per transaction?



### Retailer example



H&M has made the leap from not just focusing on sustainable products and ethical practices but applying its ethos to the entire shopping lifecycle, including customer delivery. In the Netherlands, the retailer started delivering online orders by bicycle in 2019, to more than 30 cities in the region. In 2021, it teamed up with Swedish logistics company, Budbee, to offer a more sustainable and flexible delivery service for its customers. Budbee compensates for 110% of the emissions it has generated to date, with plans to have 100% fossil-free delivery by 2022. Despite the ambitious plans, shoppers can have next-day delivery for €4.99.

Our research has shown that **sustainable practices don't necessarily mean higher costs** but that a range of affordable options can be put in place to meet the needs of both retailers and customers.

# EXPERT INSIGHT

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**Patrick Lowe**

## How can retailers and brands make ethical initiatives clear and engaging for consumers?

Retailers cannot rely on their customers to actively seek out information on their sustainability efforts. Instead, they should clearly communicate information on their initiatives and make it readily available to consumers across touchpoints. The time and effort you put into delivering on customers' ethical and sustainability expectations will be appreciated by customers, but only if they are made aware of it.

Retailers should leverage their eCommerce site and marketing communications more. Get creative about ways to share these initiatives with your customers. For example, start including QR-codes on your packaging that link to webpages detailing your efforts around sustainability. Consider growing a community focused on sustainability efforts, involving your customers in your sustainable development goals. Likewise, help consumers become more sustainable by printing recycling symbols on your packaging and offering suggestions for packaging re-use.

Start better communicating your sustainability activity and, our research suggests, you will be rewarded with new customers and brand loyalty.

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## How PFS can help

We can help you find the best packaging solutions, whether you require high-end materials, a fully sustainable pack-out, or want to offer customers the choice to opt-in to sustainable packaging at checkout. Shoppers want options – we work closely in partnership with brands to enable these options. Delivery is no different. If you want to support your customers' sustainability aspirations, offering more sustainable delivery methods is a great avenue. PFS supports effective multi-node fulfillment solutions, leverages our strong carrier relationships to combine shipments, and more.

## SUPPORTING THE CIRCULAR ECONOMY

# Spotlight on returns

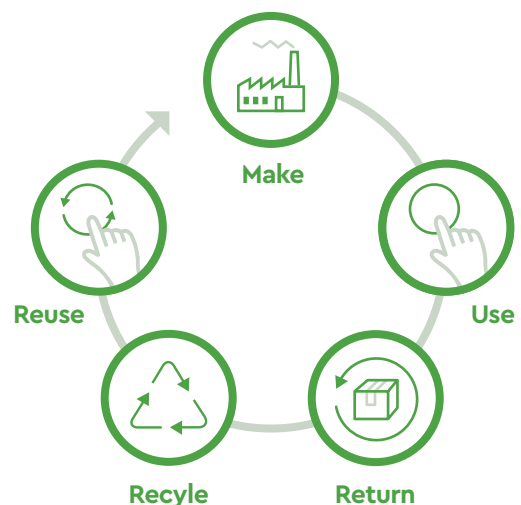
We have already touched on the role that sustainable packaging and delivery can play in minimizing a brand's environmental footprint and maximizing their reputation. But the returns process specifically can have a huge impact on making this a reality.

Our research in 2020 suggested that consumers were largely unaware of what happens to the products they return to online retailers and brands, and it seems that despite consumer desire to shop more conscientiously, retailers feel they turn a blind eye when it comes to returns. Over-purchasing is still a big issue.

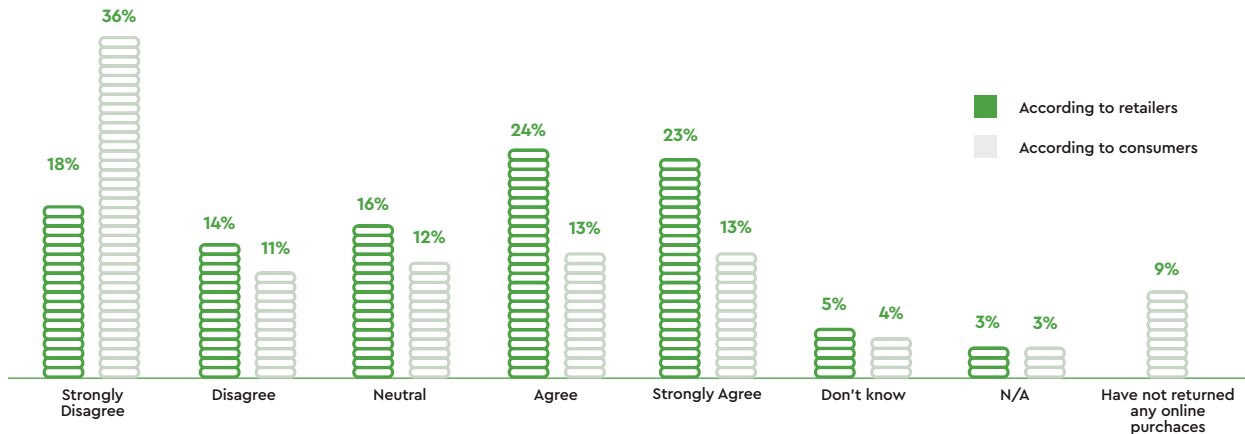
According to more than 4 in 10 retailers (47%), their customers generally over-purchase and return unwanted items. This is in stark comparison with only 26% of consumers who admit to doing this. For UK consumers this has risen from 18% in 2020 to 22% in 2021. When it comes to the reasons why, almost 6 in 10 retailers (58%) agree their organization's customers generally order multiple versions of the same item so they can decide which one to keep. Again, only just over a quarter (27%) of consumers agree they do this, rising to 31% in the US.

**Despite consumer desire to shop more conscientiously, retailers feel they turn a blind eye when it comes to returns.**

### Circular economy



## Do consumers/customers generally over-purchase and return unwanted items?



Retailers also entice customers to over-order by offering free returns. Almost 4 in 10 consumers (38%) agree free returns encourage them to over-purchase items as they know they can return them without additional cost if they want to. Free returns are also the most important aspect of a company's returns policy for over half of consumers (53%) – 58% in the UK and 48% in the US. This compares to over 4 in 10 retailers surveyed who offer free returns (46%).

With almost half of retailers saying over-purchasing happens (47%), in contrast to only a quarter of consumers who admit to it (26%), this suggests a clear disconnect between the level of returns retailers receive versus consumers' claims. So how can the impact be minimized?

### Retailer example



*With fast fashion and serial returners adding to the environmental impact, many brands including ASOS are actively making a clear commitment to reducing this and being open with customers about what happens to returns. From going paperless to recycling used mailing bags, ASOS has introduced some new processes to reduce the impact of returns. This includes never sending products to landfill or for incineration and reselling over 97% of returns. Customers can now combine their returns in one parcel, helping to reduce carbon emissions by having fewer trucks on the road.*

### Retailer example



*But there is further for retailers to go to minimize returns and reduce the amount of products ending up at the landfill. Providing better information during the purchase process, improving consumer interaction, providing refillable containers for toiletries and cosmetics, and offering product refurbishments are just a few examples of steps retailers can take. The health and beauty sector has made great strides addressing the issue of not only recyclable packaging but reusable containers, with L'Occitane being one of the first brands to offer 'eco-refill' pouches in 2008. There are many other new entrants on the market today, as well as established brands who are leading the charge on sustainable ideals.*



For 3 in 10 consumers who have returned online purchases over the last two years (31%), more detailed sizing predictions and website descriptions (29%) would encourage a lower level of consumer returns. In response, over half of retailers surveyed have made the product description more detailed on their websites (54%) over the last 12 months to try and reduce the amount of customer returns and 31% have made the sizing prediction more accurate.

Despite this, just under half of retailers (49%) agree their organization is behind the curve in their sustainable return options to consumers.

Omnichannel flexibility, such as click and collect options and the ability to return products to store instead of via the post or courier, plays a key part in a sustainable delivery and returns process. Almost two-thirds of retailers (64%) agree their organization's customers prefer to have multiple options to return a product (return to a store, return to a neutral drop off location, ship it back, etc.) versus 56% of consumers who agree they want this. 6 in 10 retailers (60%) believe most of their organization's customers have never considered the environmental impact of returning products they have purchased online versus 47% of consumers who agree with this.

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**Omnichannel plays a key part in a sustainable delivery and returns process.**

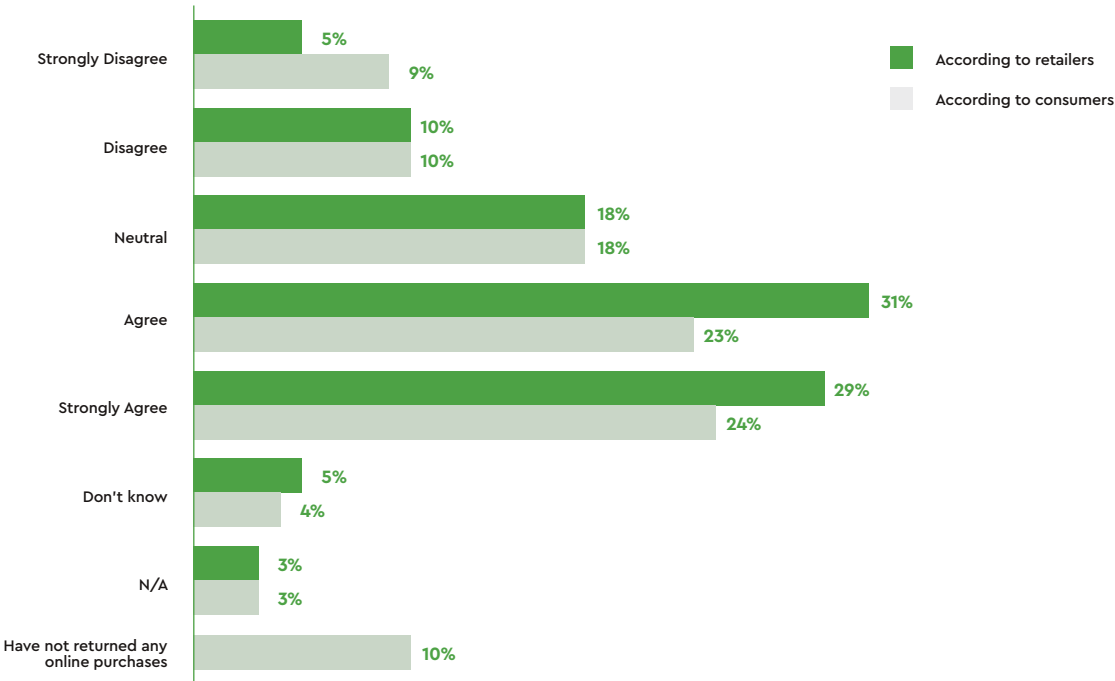
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**Consumers/customers are not aware of the environmental impact of returning products they purchased online**

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# EXPERT INSIGHT

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**Patrick Lowe**

## What key steps can brands take to minimize the need for customers to return products, without affecting their bottom line or brand reputation?

A review of your customer returns solution should start by analyzing the customer journey pre-checkout.

- Are your sizing guides easy to find, informative and user-friendly?
- Do you offer a selection of images, 360-degree views, videos, virtual testing, or similar options? According to AR Insider, these technologies are resulting in a 20–40% reduction in return rates for some.
- Is information on delivery options easily accessible and does it meet your customers' expectations?

The above all contribute to the volume of customer returns. By addressing front-end capabilities, you create opportunities to improve your back-end operation and your bottom line.

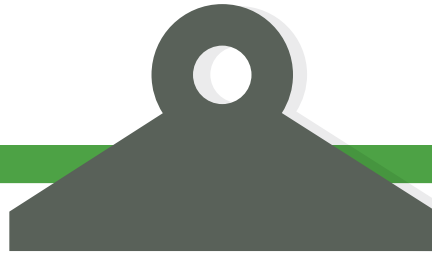
When it comes to the handling of returns, consider what more you can be doing to positively contribute to the circular economy. Are there incremental changes that can be made to extend the life of materials or products to avoid destruction? Equally, consider how you can extend the life of materials in use by exploring a subscription refill service for health and beauty products, for example. Alternative use of returned inventory could have a positive impact socially and environmentally.

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## How PFS can help

PFS provides a variety of services, including repair and refurbishment, to extend material and product lifecycle. We work with our clients to ensure a smooth reverse logistics operation, which can include grouping returns and supporting in-store returns operations. Our customer service agents are trained, to your specifications, addressing queries that may prevent the need for return. In the past we have supported brands' employee programs and charitable donations for returned merchandise.

PFS can help you turn your returns into a competitive advantage.



## Retailers' sustainability checklist

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- Make sustainable packaging your default or, at the least, provide the option at checkout
- Use right-size packaging to avoid waste
- Returns review – provide multiple returns options (in-store, local drop off, ship, etc.)
- Provide full list of ingredients for beauty products showing necessary proportions used – “conscious chemistry”
- Circular economy review – evaluate the product lifecycle and establish proper disposal of waste
- Subscription eCommerce – beauty and cosmetics brands in particular, take learnings from brands like L'Occitane and Thierry Mugler
- Shipping review – consolidate products and shipments and provide options for more sustainable delivery methods
- Utilize distributed order management (DOM) technology to enable multi-node fulfillment that reduces carbon emissions
- Implement omnichannel strategies – i.e. curbside pick up, ship-from-store, BOPIS etc.
- Improve approach to analytics and “big data” to tap into customer trends and preferences through the fulfillment journey

# Conclusion

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Minimizing the impact of the shopping journey on the environment is the ideal for both brands and consumers. But there are barriers, and cost and convenience continue to play a big part in the purchasing process. Sustainability management in online retail still has a way to go before the balance swings, but our research suggests that some shoppers are willing to pay more for a product with sustainable credentials – up to 20% more in the luxury goods sector amongst those willing to pay an increase.

Retailers and brands understand that consumers have heightened awareness levels and also that their ideals don't always match the realities of how they shop. It's a balancing act to appeal to cost-conscious consumers with cost-effective and sustainable solutions for retailers. Consumers know what they want to do but aren't actively doing it.

It is important that the retail industry – along with other influencers in the supply chain – take steps to drive and support behaviors that consumers want to demonstrate – but can't always do. Retailers need to work with consumers to make sustainability sustainable. This starts with an omnichannel strategy featuring options that appeal to every customer persona's specific needs and purchasing drivers. Your customers care about the world, so it's important to make it as easy and affordable as possible for them to be environmentally conscious and committed to shopping and living sustainably.

## Considerations

There are many ways to take steps towards sustainability that are both affordable and make a positive difference to the environment and consumer habits.

- Incentivize consumers to want and choose more sustainable options. For example, sustainable packaging can still be attractive and “luxurious” but much friendlier to the environment
- Work with a third-party logistics provider who can take the strain out of sustainability and lead to improved ROI and enhanced reputation, driving competitive advantage
- Group orders together where possible at both delivery and returns stage
- Give customers the option to opt out of plastic packaging and for a different material or method to be used in their delivery
- State clear, long-term aspirations of becoming more sustainable and make them known to your customers
- Consider how your sustainability efforts link back to the brand's ethos and communicate this to your customers
- List how the brand's sustainability efforts create a better product and customer experience

# About

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## PFS

PFS (NASDAQ: PFSW) is the premier eCommerce order fulfillment provider. We facilitate each operational step of an eCommerce order in support of DTC and B2B retail brands and specialize in health & beauty, fashion & apparel, jewelry, and consumer packaged goods. Our scalable solutions support customized pick/pack/ship services that deliver on brand ethos with each order. A proven order management platform and high-touch customer care reinforce our operation.

With 20+ years as an industry leader, PFS is the BPO of choice for brand-centric companies and household brand names such as L'Oréal USA, Champion, Pandora, Shiseido Americas, Kendra Scott, the United States Mint, and many more.

The company is headquartered in Allen, TX with additional locations around the globe.

For more information, visit [www.pfscommerce.com](http://www.pfscommerce.com)

## Arlington Research

Arlington Research is a full-service independent market research agency. We provide clients from around the world with robust data via quantitative research, in depth exploration via qualitative research, and audits on what's out there already via desk research. All our team are director level and focused on providing intelligent analysis and creative insight that help our clients bring their story to life.

Our director-level team will design your research from sample design to final reporting. Each piece of research is reliable, robust, delivered with a quick turnaround, and analyzed to ensure the research creates maximum impact. Our scope of work is broad, and we run research for leading brands and organizations from many different sectors. We are experienced in researching hard-to-reach audiences and markets and we would love to help bring your story to life.

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