



# Webinar Sustainable e- commerce

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The importance of sustainability for the Belgian consumer

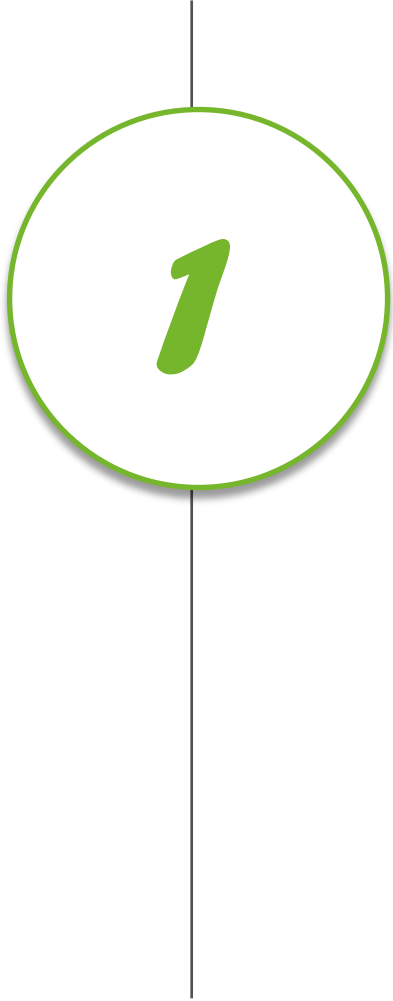
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## **Safeshops & WHY5Research**

- Belgian Online Shopper Survey
- Belgian online sustainability barometer
- Project retour
- Sustainability among Logistics Partners



A person wearing a beige coat and white trousers is walking. They are carrying a brown and white polka-dot shopping bag and a white shopping bag. A plaid bag is also visible. The background is a blurred green door.

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## **The importance of sustainability for the Belgian e-shopper**



## 02 The importance of sustainability for the Belgian e-shopper

### From the consumer's perspective sustainability is considered as an import aspect

- Sustainability is a **necessary condition** for referring to a "good webshop" for **42% of consumers**
- In particular, **packaging** is seen as the main area where online shopping can have an impact on sustainability (environmentally friendly packaging material & efficient packaging are mentioned first among consumers)
- Additionally, **social sustainability**, such as good working conditions, is also becoming more of a concern in 2022



## 02 The importance of sustainability for the Belgian e-shopper

**What sustainability related elements have an impact on the e-consumer's perception consider it a 'good' webshop?**



Having an eye for **sustainability** in general (42%)



Use **recyclable/sustainable packaging** (41%)

Do **not use oversized boxes/bags** (42%)



Offer **sustainable delivery** (40%)



Offer **sustainable products or services** (46%)

Operate **circularly** (37%)



Webshop from **another origin** raises doubts about sustainability (52%)



**Local webshop** (32%)



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Top 2 (important to very important)

## 02 The importance of sustainability for the Belgian e-shopper

### Sustainable webshops and parcel deliverers

**Bpost is considered the most sustainable.**

**Almost 40% thinks none of the deliverers are sustainable**

#### Sustainability ranking

1. Bpost (47%)
2. DHL (17%)
3. PostNL (16%)

**Bol.com is considered the most sustainable webshop**

**However, spontaneous awareness of a sustainable webshop remains vastly limited (72% unable to mention a sustainable webshop)**

#### Sustainability ranking

1. Bol.com (26%)
2. Zalando (17%)
3. Amazon (15%)





## 02 The importance of sustainability for the Belgian e-shopper

### But...

- Sustainability is **not the most important factor** when discerning 'good' from 'bad' webshops (price and delivery remain the most decisive)
- Despite its claimed importance, only an estimation of **12%** would be **willing to pay more** for it when shopping online.
- However, **among younger generations willingness seems noticeable higher** (34%), compared to 50+ (12%)



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## Sustainability from the perspective of Belgian webshops





### 03 The perceived importance of sustainability among Belgian webshops

**Sustainability is considered highly important among Belgian webshop owners (73%), with the feeling it will only become increasingly important**

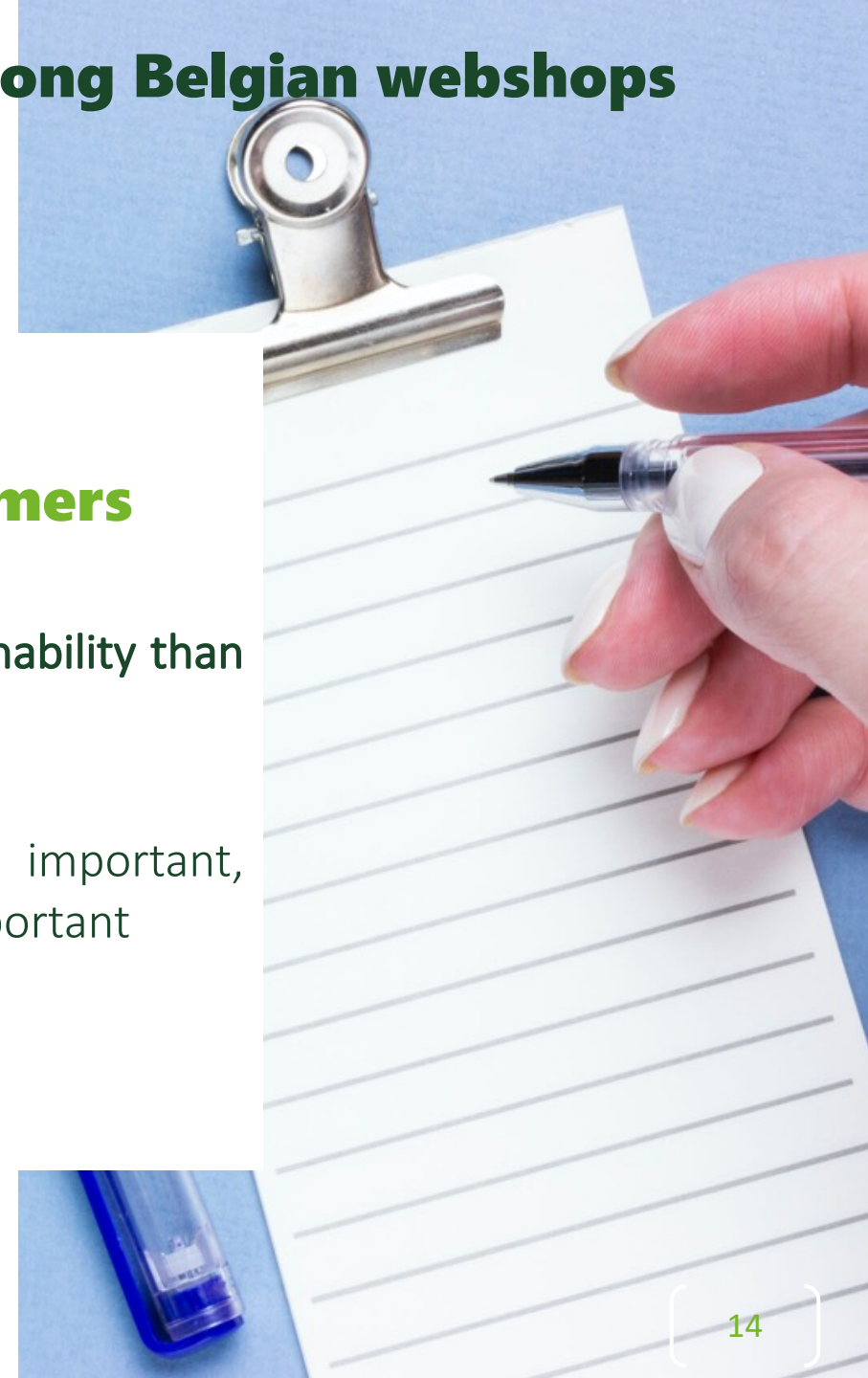
- A majority (78%) have the **ambition to improve their sustainability level in the coming 3 years**
- **On average** they attribute a **6,5/10** score to their **current sustainability level**.
- With the ambition to increase this score to an 8/10



## 03 The perceived importance of sustainability among Belgian webshops

### Belgian webshops believe they attach more importance to sustainability than their customers

- Belgian webshop holders accord a **higher importance to sustainability than they expect their customers** find it important
- Webshop holders estimate 51% of their customers find it important, whereas 73% of webshop holders state that sustainability is important



## 04 What keeps webshops from doing more?

**Despite the commitment of webshops towards sustainability, consumers are given little encouragement to make more sustainable choices**

- 63% does not encourage their customers to make more sustainable choices during the online purchase
- There is still a **fear to scare off some customers** when trying to push them into more sustainable choices
- Webshop holders presume that sustainability in the consumer's mind is **linked to higher cost, longer delivery time, more limited offer and more hassle** (e.g., pick it up themselves)
- Micro and small webshops state to do more efforts on this level compared to medium and big webshops.





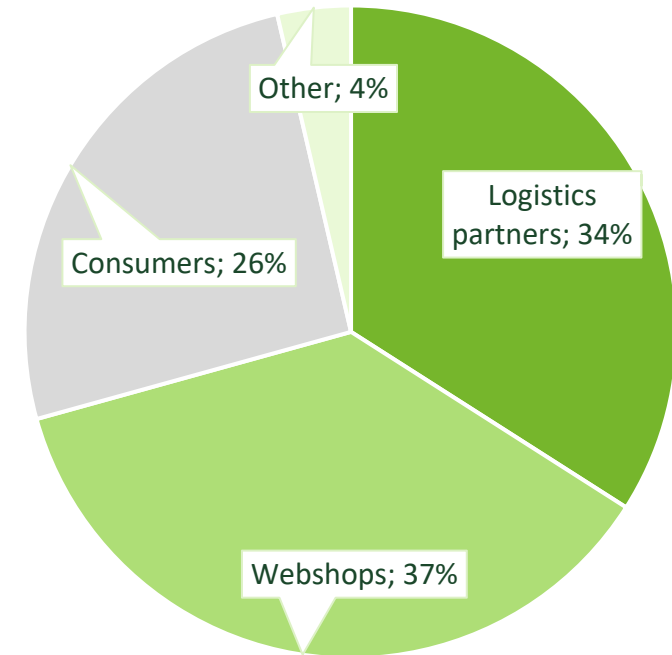
## 04 Who is deemed responsible for sustainability in Belgian e-commerce?

### Webshops consider it a shared responsibility of all actors involved.

Where webshops consider themselves and the logistic partners as bearing even somewhat more responsibility in the task.



*If the responsibility of further development of sustainability in the Belgian e-commerce would be 100%, what percentage of this responsibility would you attribute to each of these actors?*



Others mentioned are:

- Producers of packaging material
- Producers of products that I sell
- Transport from producers to webshop
- Government
- Large webshops ("stop framing clients with 'free delivery' promises")



## Some critical success factors can be identified to support Belgian webshops in their endeavour to become more sustainable

1. Providing **digital support** (software for efficient logistics and education on the implementation of AI or AR to avoid returns)
2. Providing clear **insight in the sustainability of all transport options** (simulations tools that take all factors into account)
3. **Make the consumer feel more responsible** (awareness concerning their responsibility in choosing sustainable and influence public opinion)
4. Assist webshops in **prioritizing and developing a long-term sustainable plan** (sustainability goals, common roadmap for the sector, simulation tools of eco-impact)
5. **Increase return management awareness** (demonstrate how to do it right)



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## **Efforts on sustainability by Belgian webshops**





## **Specific sustainable practices are currently concentrated around:**

1. Packaging
2. Avoiding returns

## 04 Current efforts Packaging

**Currently there is a focus on packaging regarding sustainability among most webshops:**

- Bundling shipments in one package (86%)
- Usage of durable/limited padding materials (77%)
- Reduction of the packaging volume (73%)





## 04 Current efforts

### Avoiding returns

**High confrontation with daily returns, looking for ways to reduce returns, but not the #1 priority**

- Has high **budgetary impact**, but also a growing importance of the **ecological impact** on webshop's agenda
- Current practices to avoid returns are focused on:
  - **Financial** measures
  - **Process** measures
  - **CX** measures





**The intentions towards the future with the most potential to improve sustainability (and perceived most doable) are:**

1. Transport & logistics
2. Packaging
3. Returns

# Thank you,

**And let's talk!**



# Contacts



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