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Etos should communicate more about their sustainable initiatives

A theoretical and practical research thesis focusing on improving the communication about sustainability towards consumers and store employees

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MANAGEMENT SUMMARY

Climate change is an increasing cause for concern and action needs to be taken to secure the future for next generations. The United Nations developed sustainable development goals, five of which focus on environmental sustainability. Everybody is expected to take actions, as well as companies. Etos does their part in the fight against climate change with various initiatives. However, the sustainable brand index of 2023 showed that consumers do not think of Etos as being a sustainable brand. This is a considerable problem since Kruidvat, their main competitor, now wins both the price and sustainability perception. Part of the reason Etos loses on sustainability perception is their lack of communication. The aim of this thesis is increasing the consumers' perception of Etos regarding sustainability. Therefore, the main research question is: How can Etos improve their communication about sustainability towards consumers and store employees? This question is answered with the use of a communication model for the communication on the website, market research for other on- and offline communication media, a survey to gain insights into consumers shopping behaviour and employee sustainability knowledge and a literary framework.

There are various drugstores in the Netherlands, Etos, Kruidvat, Holland&Barrett, Trekpleister, Da and the online drugstore called deonlinedrogist.nl. Etos has been a drugstore for over one hundred years and operates in 550 stores in the Netherlands. It is part of a bigger organisation called Ahold Delhaize. Also, part of this organisation is Albert Heijn, which allows for cross banner collaboration and joined projects. Etos operates in the categories Makeup, Baby, Skincare, Vitamins/supplements/minerals, and Self-medication/painkillers. Medicine is a dominant category in Etos' sales. This is because of the unique selling point of drugstores. They are easily accessible and are allowed to sell over the counter drugs that require additional expert consults.

However, this unique selling point could vanish when the new bill is accepted that requires online consults instead of on-site consults. This would open up the drugstore market for new players. There are various other trends affecting the drugstore industry as well. The inflation caused an increased focus on price perception, which is disadvantageous for Etos because their price perception is higher than that of Kruidvat. Furthermore, consumers are increasingly concerned with climate change and this concern is shared by governments. Both require communication from companies about their sustainable initiatives, it will even become mandatory to report on goals and progress from 2024. Since Etos directly sells to consumers, they need to be especially attentive of consumers demands and changing trends. Therefore, it is important Etos acts and differentiate themselves towards the sustainable drugstore in order to fight for their market share.

Sustainability is a very broad concept, and this thesis narrows the scope to environmental sustainability, referring to actions for to ensure nature and humans can exist in harmony today and in future generations. Since it is a concern for everyone, everybody is expected to act accordingly. Consumers say they are more concerned than last year, but it is unclear if they act on this statement. There are various barriers to prevent an intention from becoming an action, this is called the say-do gap. Most of these barriers come down to consumers requiring additional communication to educate and inform them about sustainability.

Communication is the process of sharing information that aims to increase understanding between people or groups. The term sustainable communication refers to all types of corporate and marketing communications about sustainability. Key to communication is defining the recipient of the communication. In this thesis the recipients are the consumers and store employees of Etos. The communication about sustainable actions influences both consumers' brand perception and their

shopping behaviour. However, there are different types of consumers, with different beliefs and they require different communication approaches. Over time, the most sustainability engaged group has grown, this indicates that consumers are increasingly involved with sustainability. Everyone can act more sustainably, but they all need to overcome some hurdles to make more impact. Companies can target their communication about sustainability to a consumer group to influence their sustainability perception and actions. This communication can be subconscious or conscious. Subconscious influences consumers with increased salience and simplification nudges, they draw consumers attention and reduce the effort of searching for products. The conscious communication is targeted directly at the intended stakeholder. A form of conscious communication is via the corporate website. This medium is often used by stakeholders actively looking for information about the company. On the website companies often post their sustainability reports and/or initiatives they deem important to share with their stakeholders. The integrity of the information should be guarded at all times to prevent greenwashing and consumers mistrusting sustainability claims.

This thesis used three methods to test the sustainable communication of Etos and their competition. The subconscious communication of Etos and its Dutch competition was reviewed based on three sustainability nudges in-store, in the flyer and on social media. The survey asked store employees to score consumers actions regarding sustainability, the value of consults and their own knowledge about sustainability. For the general data, a Chi-Square goodness of fit test was performed, unfortunately the categorised data of province, function and organisational structure did not allow for a statistical test. Lastly, the communication model was a standardized method to compare the corporate website sustainable communication of Etos, the Dutch competition, and the UK drugstore Boots.

Results indicate that Etos does not perform well on the nudges in-store and in the flyer compared to the competition. Their communication on social media, however, is better than the competition. Furthermore, 240 store employees filled in the survey and the null hypothesis that the data is evenly distributed across all categories is rejected for every question. Although the median and modus are the same for the questions if sustainability is important or determinative for consumers purchasing behaviour, the distribution of the determinative nature of sustainability is skewed towards not being determinative. This indicates that consumers think sustainability is more important than it is determinative, possibly illustrating the say-do gap. Consumers ask questions about sustainability about once a week to once a month and they are most interested in the topic natural ingredients. When looking at the importance of consults it becomes apparent that consults influence consumers shopping behaviour sometimes to regularly. However, the portion of store employees incorporating sustainability in their consults on a regular basis is much smaller. This could be explained by the small percentage of store employees scoring their sustainability knowledge positively. They are, however, willing to learn more about all categories of sustainability. The open questions also illustrated the employees' engagement with Etos, and they suggested several sustainable initiatives and options for communication. Overall, there were little to no differences in responses to the questions between provinces, function, or organisational structure. The results can therefore be interpreted as being the general consensus for the Netherlands. Lastly, the communication model indicated the importance of a sustainability report for ticking boxes on sustainable communication. Out of the companies lacking the sustainability report, Etos' sustainable communication scored best. However, this was still a weak compliance to the sustainable criteria of this model, whereas Kruidvat and Boots scored excellent compliance. This indicates that Etos has a lot of room for improvement regarding sustainable communication.

Overall, consumers demand companies to act more sustainable and communicate about their initiatives. The last sustainable brand index score showed that Etos took a fall in their sustainable brand perception. Therefore, Etos needs to improve the communication about sustainability in order to be perceived as a more sustainable company. This thesis points out several recommendations to improve this sustainable communication. First, the type of sustainable consumer most important and fitting for Etos needs to be determined as they dictate the tone and content of the communication. Based on insights in this thesis, I deem the pragmatist and busy bystander most fitting for Etos' current customer communication. The communication should aim to educate consumers about sustainable initiatives and making impact and provide convenience during the shopping experience. Second, the nudge of simplicity categorizes sustainable products together, increasing consumer convenience and should be accompanied with subtle increased salience nudges to draw attention to the sustainable products. Third, Etos should publish a sustainability report since it will become mandatory in 2024 and they should draw on Albert Heijn's decision tree as foundation for more specified filter and possibly even sustainability labels. However, the website should not be the sole sustainable communication medium. Forth, the flyer and social media should also convey the sustainability message with the use of nudges. Especially the flyer should start with this type of communication. Lastly, Etos should focus on educating both consumers and store employees on sustainability. These recommendations could improve Etos' sustainable communication towards consumers and store employees and ensure a better sustainable brand perception.

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INTRODUCTION

Sustainability has been a hot topic for a number of years now and the people recognize the importance of taking action to secure a future for the coming generations. In 2015, the United Nations developed 17 sustainable development goals (SDG) to take action to end poverty, ensure people's wellbeing and protect the planet. Five of these have an environmental focus, goal 13-17. Almost 200 countries have committed themselves to prioritizing the SDGs to facilitate change (United Nations, n.d.). The commitment from these countries shows that governments take responsibility in the fight against climate change. Besides the need for governments to take action on becoming more sustainable, consumers also expect companies to take responsibility for their actions (Ehgartner, 2018). The retail industry is especially intertwined with consumers wishes, since consumers are their main customers. Consumers demanding accountability from retail companies meant that companies needed to carry out sustainable initiatives and communicate to the consumer about these initiatives.

Etos is an example of a retail company that needs to follow consumer trends closely. The need to become more sustainable has not gone unnoticed and there are various initiatives in place to facilitate sustainability. Their private label has initiatives in place to reduce microplastics, commit to responsible and natural resources like palm oil and make their packaging both recyclable and of recycled content by 2025. Furthermore, their operation aims for emission free delivery by 2030. In the last strategy day at headquarters, they also reported on saving approximately 4 Vondelparks worth of trees, equalling 20.000 trees since installing their paper reduction initiatives (Homburg, 2023). Overall, Etos has committed itself to becoming more sustainable. This effort was recognized by consumers. The sustainable brand index (SBI) publishes annual reports to give insights into consumers perception of brand regarding sustainability. Etos rose from place 75 in 2017 to place 44 in 2022 (SBIndex, 2022). In 2022 the report ranked a total of 202 companies across 17 different industries. The drugstore rival Kruidvat ranked 58 in 2022. However, consumers apparently do not perceive Etos to be as sustainable in 2023. Etos dropped from place 44 to place 76, this year the report ranked 209 brands (SBIndex, 2023). Kruidvat is ranked 59 in 2023 and is thus perceived as more sustainable than Etos.

Etos was already struggling to grow their market share in a time where price perception is considerably important. Now, Kruidvat has a better price perception and sustainability perception. After further investigation it turned out that Etos did not communicate to consumers about their sustainable initiatives, possibly explaining the low sustainable brand perception. Therefore, this thesis focusses on the way Etos communicates about sustainability. The communication towards consumers and employees is the topic of interest. Since store employees are in direct contact with consumers it is important that they have sufficient knowledge about Etos' sustainability efforts as well. The aim of this thesis is to increase consumers' sustainability perception of Etos, which led to the main research question is: How can Etos improve their communication about sustainability towards consumers and store employees?

Various sub questions aid in the answering of the main research question:

- How does Etos communicate about sustainability in-store, in the flyer and on social media compared to the Dutch competition?
- How does Etos communicate about sustainability on their website compared to the Dutch competition and compared to Boots?
- To what extent is consumers' shopping behaviour influenced by sustainability and consults?
- To what extent are store employees informed about Etos' sustainable initiatives and sustainable product information?

These questions are answered with the use of a communication model for the website communication, on- and offline market research regarding the in-store, flyer and social media communication, a survey to gain insights into consumers actions and store employees' knowledge, and literature study.

First, the industry Etos operated in will be described. Second, the scope regarding the term sustainability will be defined. Lastly, the theoretical framework regarding (sustainable) communication will introduce the theory behind the practical research. The thesis ends with recommendations to improve sustainable communication towards consumers and store employees.

ABOUT ETOS

Ahold Delhaize is one of the largest food retail groups worldwide (Ahold Delhaize, n.d.). This organization operates in a total of ten countries in Europe, the United States and Indonesia. A total of nineteen brands are included under the Ahold Delhaize banner. In the Netherlands, Ahold Delhaize operates with 4 different brands: Albert Heijn, Bol.com, Gall&Gall and Etos. Each brand needs to adhere to the set rules and targets of Ahold Delhaize. This thesis will focus on environmental sustainability within Etos, therefore, some of Ahold Delhaize's environmental topics are especially important to highlight; They aspire to reduce CO_2 emissions throughout the entire supply chain with an 83% reduction compared to 2018 by 2050; To achieve zero deforestation, 100% of the sourcing of coffee, tea, cocoa, palm oil and soy for private label products should be done sustainably by 2025 (Ahold Delhaize, 2023). These initiatives and targets are decided upon in the Ahold Delhaize strategy and Etos must comply.

Etos is a drugstore with over 100 years of experience in personal care, offering consumers solutions for health and beauty care (*About Us | Etos*, n.d.). They have the second largest market share in the Dutch drugstore market of 22.3% in 2022. Etos operates with 550 stores in the Netherlands, of which approximately half being franchises. Etos is an abbreviation from the core values; "Eendracht, Toewijding, Overleg and Samenwerking" (English: Unity, Devotion, Consultation and Cooperation) (*Etos*, n.d.). Their appearance is often perceived as high-quality and calm. They aim to be the approachable expert during all stages of a consumer's life and support consumers to live well, get well and stay well. This expert advice is provided by their trained and certified druggist. Etos' target customer is the 30–40-year-old female whose purchases are price and quality driven (Ipsos, 2022a).

Etos' assortment can be categorized in five categories: Makeup, Skincare, Baby products, Vitamins/minerals/supplements, and Painkillers/self-medication.

Medication is a vast portion of Etos' business plan. Drugstores and pharmacies are allowed to sell over the counter drugs that have additional risk without the proper care (Tweede Kamer der Staten-Generaal, 2022). The staff of drugstores need to possess sufficient and high-quality information to inform consumers. Therefore, consulting consumers about medicine, but also other categories became a large part of drugstores unique selling point. Since drugstores are often located in city centres, they are easily accessible. The accessibility combined with the need for expert consults for specific drugs, position drugstores in the middle of pharmacies and retail stores like supermarkets.

MARKET TRENDS

A lot has changed over the years and like any other store, Etos tracks market trends and responds to these changes. Defining every trend possible is beyond the scope of this thesis, therefore the trends effecting Etos most will be discussed in this section. The focus lies on consumers perception, sustainability and the changing drugstore industry.

Both COVID-19 and the Russian invasion of Ukraine destabilized the global economy, ultimately resulting in increased inflation which creates a cost-of-living crisis (Ahold Delhaize, 2023). With the increasing wealth gap between low and high incomes and high prices, low-income households are struggling to get by (Ipsos, 2023a). Consumers are price and promotion-focussed in these uncertain times and want to get the lowest price without compromising on quality. Furthermore, companies are struggling to keep prices low while keeping profit margin on their sales. The resources have become more expensive as well as the labour costs. These economic adversities challenge both consumers and companies.

Consumers attitude towards life and demographics has changed as well. Worldwide, people are living longer. The population aged over 60 years and over is increasing rapidly. It is even expected that the world's population of people older than 60 will be doubled to 2.1 billion by 2050 (World Health Organization, 2022). However, the proportion of years lived in good health has remained the same, implying that the additional years are lived in poor health. Aging is inevitable, but everyone wants to grow old with high quality of life. This has spiked the trend of healthy aging. Healthy aging is defined as the process of maintaining and developing functional ability that enables wellbeing whilst aging (Rudnicka et al., 2020). This urge for healthy aging can be recognized in multiple generations. Millennials, born in 1981-2000, want to look good and remain fit and healthy, Gen X, born in 1965-1980, want to manage stress and slow down the effects of aging, and Baby Boomers, born in 1946-1964, want to age gracefully and prevent future illness (Etos, 2023). This movement that focusses on one's wellbeing includes both physical and mental health. Diet is a large part of a healthy physic. People are more aware of the things they eat and the nutrients they are supposed to be eating in a day (National Institute on Aging, n.d.). To complement their current diet, people consume vitamins and supplements on a daily basis. The drugstore assortment also adapted to this trend by selling additional vitamins and supplements, this became an important category within drugstores.

Besides an attitude change regarding aging, consumers' and companies' attitude towards environmental trends also intensified. Climate change has been an ongoing trend for decades and is now widely recognized. Ipsos conducted a survey to score society's perception on climate change.

80% Agreed that an environmental disaster is inevitable unless we change our habits quickly (Ipsos, 2023a). 80% Of consumers also state that sustainability affects their purchasing decisions to a certain or large extent (SBIndex, 2023). The SBI also categorized Dutch consumers into four types based on their sustainable actions: ego, moderate, smart and dedicated. The ego group prioritizes price and convenience over sustainability. The moderate group somewhat prioritizes both affordability and sustainability and the dedicated group always prioritizes sustainability. Over the past 5 years the ego and smart group remained stable. The moderate group declined, and the dedicated group increased. This implies that people engaged with sustainability prioritize it more and more.

Everyone needs to contribute in order to make real impact regarding climate change. Consumers want companies to focus more on sustainability and be transparent about their initiatives (Kavakli, 2021). Such sustainable initiatives could be identified in both products and operations. In drugstores, the customer demand for natural ingredients, vegan products and sustainable packaging is high and this translates into a change in assortment (Etos, 2023). For instance, shampoo bars as a result of product innovation, this is the sustainable alternative for shampoo bottles. Companies recognise the value of becoming more sustainable due to customer demand and the increasing incentives proposed in politics.

The United Nations developed the SDGs to inspire and promote sustainable initiatives worldwide. Politics also developed such sustainable initiatives to enforce laws on climate preservation. The European Parliament reached an agreement, Green Deal, on the climate law describing the obligation to be climate neutral in 2050 (Europees Parlement, 2021). This also raises the ambition to reduce the greenhouse gasses with 55% compared to 1990. Furthermore, the law provides clarity and for both civilians and companies to prepare for a transition towards sustainability. As part of this Green Deal, companies are obligated to report on their activities impacting people and the environment from 2024 onwards (European Commission, n.d.-a). Another political trend affecting the drugstore industry is the bill to change the current medicines law. The current law describes the need for a certified druggist to be present to consult on purchases of certain medicine. These specific medicines are only to be sold in pharmacies and drugstores, due to the need for additional specialized consultation to inform consumers about the use, effects, and risks. However, since drugstores are already permitted to sell medicine via their website accompanied with digital consultation, The House of Representatives discussed a change in this law to allow digital consultation via a tablet instead of physical on-site consultation (Tweede Kamer der Staten-Generaal, 2022). This change of law could have far-fetching implications for drugstores as it allows for other industries to sell specific medicine. Drugstores might need to re-invent their unique selling point when they are not the sole industry that is allowed to sell such medicine.

The technology industry is fast moving and innovates quickly. The introduction of online stores gained traction of consumers, and this increased during COVID-19. 60% Of sales in the retail industry are offline in physical stores and 35% in brand websites (Retail Drive, 2023). This illustrates that both on- and offline sales are here to stay. Omnichannel marketing allows companies to reach a broader audience, improves consumer experience and provides consumers multiple channels for customer purchase (Vericast, 2023). Online channels are not limited to websites but also include social media. creating an effective omnichannel strategy can help boost annual revenue with 9.5%, not limited to online sales (Vericast, 2023). The symbiotic effect of omnichannel receives considerable attention and companies will try to optimize their omnichannel strategy to meet consumers' expectations. In case of drugstores, this means that the consultancy role needs to be implemented in the online environment as well. There are also new companies in the market that are solely present in the online environment, drugstores like Etos need to conduct a well-developed omnichannel strategy to stay relevant in both the online and offline environment.

COMPETITION

Etos competes in the competitive drugstore market in the Netherlands. Besides physical drugstores, there are also online drugstore providers competing for the attention of the consumer. This section discusses the four most prominent competitors with physical stores: Kruidvat, Holland&Barrett, Trekpleister and Da. In addition to these competitors the main online-only competitor Deonlinedrogist.nl will also be discussed and the UK drugstore Boots since it is a source of inspiration for Etos. This competition analysis provides insights into the market Etos is operating in and Etos differentiating options.

Kruidvat is the most dominant player in the drugstore industry and has the largest market share. They have 970 operating stores in the Netherlands and are known for the catchy slogan “steeds verrassend, altijd voordelig” (English: continuously surprising, always beneficial). This refers to their perceived market position as being the cheapest option for your drugstore products. Holland&Barrett targets consumers with a higher sustainability awareness. They operate in the more high-end market by selling less well-known brands that focus on natural ingredients and are generally more expensive. In the Netherlands 200 drugstores carry the name Holland&Barrett with the slogan “de kracht van de natuur” (English: the strength of nature). Trekpleister and Kruidvat are both part of the holding A.S. Watson, which is the market leader in health and beauty in the Benelux. Trekpleister owns 200 stores in the Netherlands and proliferate themselves as being a neighbourhood drugstore, often located in suburbs rather than city centres. Their slogan is “altijd meer drogist voor jou” (English: Always more drugstore for you). Da has 300+ stores and has the slogan “voel je goed” (English: feel good). Their assortment focusses primarily on health and care. Deonlinedrogist.nl is the main online-only drugstore and it provides expert advice on demand. They offer over 40,000 products in health, beauty, and care categories. Boots is a UK equivalent of a Dutch drugstore but developed itself into being a pharmacy. They therefore have more rights to sell medicine in the health sector. Boots is the UK's leading health and beauty retailer and operates in 2,200 stores. Their slogan is "Boots with you. For life.” The high-quality product offering, expert advice, and focus on both beauty and health is something Etos values, therefore Boots acts as inspiration for Etos.

In this time where customer brand perception is especially important, Etos is facing a challenge. The Etos strategy meeting of 2023 showed that consumers have a higher price perception for Etos compared to Kruidvat, meanwhile Etos’ actual prices are not higher than those of Kruidvat. This misconception threatens to affect sales in these economic uncertain times. Additionally, according to the SBI, Etos' sustainable brand perception has suffered a fall as well. Since consumers value the actions of companies regarding sustainability to a greater extent, this falling brand perception could be troublesome when not acted upon. Especially since Etos initiated various projects to become more sustainable, but consumers are apparently not aware of this effort. Furthermore, the entire drugstore market is threatened by the possible new medicine law. When medicine do not have to be purchased at drugstores, sales could be affected. A strong trait of Etos is the ability to co-create projects with Albert Heijn, the market leader in grocery stores in the Netherlands. Albert Heijn started various initiatives to become more sustainable and report on their progress and Etos could piggyback on some of these initiatives. Since Kruidvat embodies the low-price perception for a long time now, there lies opportunity for Etos to differentiate itself in the market, improve their sustainable brand perception and build consumer loyalty by embodying sustainability for an acceptable price (Vadakkepatt et al., 2021).

SUSTAINABILITY

DEFINITION OF SUSTAINABILITY

Sustainability gained considerable attention over the past decade and grew out to be a broad concept encompassing multiple dimensions. The United Nations described sustainable development as "a development that meets the needs of the present without compromising the future generations to meet their needs. ("Report of the World Commission on Environment and Development: Our Common Future," 1987). This broad concept includes economic, social, and environmental developments. Economic sustainability refers to the actions that support long-term economic growth without compromising social, cultural, and environmental aspects of the community (University of May Washington, n.d.). Social sustainability is the effort to create a futureproof community that meets the diverse and inclusive needs of current and future residents, contributes to a high-quality life for everyone and offers equality of opportunity and good services for all, without compromising the environment (Eizenberg & Jabareen, 2017). Lastly, environmental sustainability refers to the practises that create and maintain the conditions under which nature and humans can exist in harmony to support present and future generations (U.S Environmental Protection Agency, n.d.-a). Exploring the communication of all three dimensions of sustainability is too extensive for this thesis, therefore the remainder of this thesis focusses on environmental sustainability.

SUSTAINABILITY EFFORTS IN THE FOOD AND NON-FOOD RETAIL

Every industry has different environmental sustainability challenges. Since Etos operates in the retail sector, this section focusses on the food and non-food retail. Retailers sell goods and services to consumer and often from the bridge between product producers and consumers. Since the consumers are in direct contact with retailing companies, their wishes, and expectations shape retailers' business strategy. 55% Of consumers are consciously purchasing sustainable products, was concluded after Deloitte's consumer tracker survey (*Sustainability In Retail | Deloitte Global*, n.d.). 32% of the consumer purchasing sustainable products even indicate to focus more on sustainable features than on price. All most half of these sustainable purchases were made in the food and beverage category. No wonder food retailers put effort in becoming more sustainable. Focus on sustainability in grocery stores appears to be beneficial for sales, organic supermarkets for instance more than doubled their sales when comparing 2010 to 2017 (Saber & Weber, 2019). Besides a sustainable assortment that focusses on vegan and biological products, grocers also limit their plastic packaging and implement sustainable services and initiatives. An example of such a sustainable initiative is reducing food waste with discounts on almost-expired food products. Such sustainable initiatives are regarded positively by consumers as it helps them be more sustainable while saving money (Cicatiello et al., 2019). The non-food retail also aspires to act more sustainable. The fashion industry for instance introduced garments made from biological textile (Adamkiewicz et al., 2022). The transition from unsustainable fast fashion towards more circular fashion was encouraged by customers voicing their wish for fashion brands to become more sustainable. Consumer survey concluded that 71% of the millennials want fashion brands to act in a more sustainable manner (Keeble, 2013). Thus, both food and non-food retailers initiated various sustainable efforts in response to the increasing demand for sustainability from the consumers.

However, the responsibility of a circular economy does not rely on retailers solely. Typically, retailers' supply chains account for 80% their greenhouse gas emissions (Bove & Swartz, 2016). Therefore, the entire supply chain should be held accountable for their actions and emissions. The United States Environmental Protection Agency describes the principle of three Rs to achieve such a circular economy throughout the supply chain: reduce, reuse, recycle (U.S Environmental Protection Agency, n.d.-b). These Rs encompass the entire supply chain, including manufactures and consumers. Reduce focusses on reducing the input in the manufacturing phase, such as the use of resources, energy, and materials. This also includes the reduction in use of packaging materials. The responsibility of the principle of reuse lies throughout the entire supply chain, but especially with consumers. The fashion industry is a wonderful opportunity for reusing products, since study shows on average clothing items are only worn 3 to 7 times before discarding them (Vadakkepatt et al., 2021). After the initial utilization by consumers, products can often be used by other people or for other purposes, instead of being thrown away. Recycling focusses on transforming and converting waste into new materials and products. Since waste is produced during the entire supply chain, every contributor could contribute to a circular economy by recycling their waste. Retailers can play a significant role in making the entire supply chain more sustainable by encouraging both suppliers and consumers to do their share of the work.

SUSTAINABILITY SAY-DO GAP AMONGST CONSUMERS

Sustainability is top of mind nowadays and consumers consider it to be important. They expect companies to take their responsibility in this matter, but the question is if consumers practise what they preach. There are conflicting articles on this topic. On the one hand there is Mckinsey's study showing an increased growth for products making sustainability claims, 28%, compared to products that do not make sustainability claims, 20%, over the five-year frame from 2017-2022. (Doshi & Noble. Steve, 2023; Frey et al., 2023). These products with sustainability claims had price premiums of 16-35%. This indicates the consumers’ willingness to purchase products with sustainability claims and that they consent to paying that premium. On the other hand, there is a gap between consumers' statements and behaviour, they frame it as the say-do gap. 70% Of the interviewees in Ipsos global study were more concerned about the environment compared to a year ago and 72% voiced their opinion that everybody should take action to bring hope for future generations (Strong & Long, 2021). However, the increase in engagement with sustainable behaviour remains limited. This say-do gap could be explained by the theory of planned behaviour.

The theory of planned behaviour is a theory to predict and explain human behaviour (Ajzen, 1991). Before a consumer actually purchases a product, there needs to be an intention to buy the product. This intention can be influenced by three beliefs: attitude, subjective norms and perceived behavioural control. Attitude refers to a person's positive or negative evaluation of a certain behaviour. A positive evaluation of a particular behaviour enforces the intention to engage in that behaviour. Subjective norms explain the person's perception of social pressure regarding a certain behaviour. The effect this belief has on the intention is more difficult to predict since it depends how much the consumer values other people’s opinions and their willingness to comply to their expectations. Lastly, perceived behaviour control refers to a person's perception of the difficulty or ease of executing a particular behaviour. A perception of a successful execution will positively influence the intention to engage in this behaviour. These beliefs influence the intention to perform a certain behaviour and as a result the actual action of undertaking that behaviour.

There are several barriers negatively influencing consumers beliefs and thereby intention and behaviour. One of which is the lack of knowledge and awareness regarding sustainable actions (Brandão & Costa, 2021). People are often not aware what consequences their actions have on the environment. In general, having knowledge about the environment and sustainability positively influences consumer's attitudes. Important to keep in mind that consumers mistrust sustainability claims, when it is not backed by additional information and data. Consumers require knowledge to be able to assess the quality of sustainability claims. Furthermore, when knowledge is widespread and people make their attitudes towards sustainability know, it also influences the subjective norm (Strong & Long, 2021). Another barrier is the perceived high price, this could affect consumer's attitude towards sustainable products (Brandão & Costa, 2021). The McKinsey report, however, suggested that the price is not as big of an issue anymore (Frey et al., 2023). Important to note is that this report did not categorize product purchases with sustainability claims on income. Some people are not able to pay the price premium, highlighting another barrier affecting both attitude and perceived behavioural control since these consumers will not have a perception of successful execution (Strong & Long, 2021). There are many more barriers regarding sustainable behaviour, but I will keep the barriers relevant for sustainability at Etos by ending this paragraph with one last barrier. The perceived lack of availability results in inconvenience to buy sustainable products (Brandão & Costa, 2021). The perception of a lack of availability and inconvenience negatively impacts attitude and the perception of successful execution related to perceived behavioural control. Most of these beliefs require additional communication to change the negative impact of the barrier into a positive intention. Etos could therefore influence the three beliefs with additional communication in order to change consumers sustainable behaviour.

COMMUNICATION

DEFINITION AND STAKEHOLDERS

Cambridge dictionary defines communication as “the process of sharing information, especially when this increases understanding between people or groups” (*COMMUNICATION | English Meaning - Cambridge Dictionary*, n.d.). Communication became increasingly important because of the nature of sustainability. Generally, sustainability is a complex topic that needs overcoming regarding societal communication (Genç, 2017). Some sustainability goals can appear ambivalent in terms of conflict of values or conflict of interest. To overcome this ambiguity, communication is essential to create a common understanding and concrete goals. This communication can be external or internal. Internal is directed either upward or downward across organisation's employees. External communication can be directed to consumers or suppliers. It is important to determine which stakeholders are relevant for a certain topic to determine the route and tone of communication.

Stakeholder is a broad term referring to people, organisations, etc. who are involved in or buys from the company are invested interested in its success (*STAKEHOLDER | English Meaning - Cambridge*

Dictionary, n.d.). Etos has many stakeholders, ranging from consumers to suppliers and the organisations within Ahold Delhaize. For the sake of simplicity, this thesis narrows down the number of stakeholders for communication about sustainability to consumers and store employees. For this thesis, the purpose of communication is to inform, activate and create awareness across these stakeholders for their sustainable initiatives. The purpose of informing Etos' stakeholders is to align people's perception and understanding of sustainability topics. Activating stakeholders is the purpose of stimulating sustainable decision making in stakeholders' actions. Lastly, creating awareness draws attention to the sustainable initiatives.

COMMUNICATION ABOUT SUSTAINABILITY

There are many different channels to convey sustainability messages. Companies make use of communication channels like flyers, social media, campaigns, commercials, and in-store communication materials. Recently, a popular medium to communicate about sustainability is the corporate social responsibility report (CSR). This report includes companies' considerations of three dimensions, people, profit and planet and they are referred to as the triple bottom line or the 3Ps (Vadakkepatt et al., 2021). Companies use this triple bottom line, together with the SDGs as guideline for their CSR reports (De Villiers & Alexander, 2014). They publish this report annually to inform their stakeholders about the sustainable initiatives and the progress they made on the sustainability goals they set in prior CSR reports. As mentioned before, reporting on a company's impact for people and environment becomes mandatory by 2024. Since Etos does not yet report on their impact, this thesis could help formulate topics of importance for the future CSR report.

Besides the law enforcing the need for communication about sustainability, it can also benefit consumers' brand perception. Non-green corporate actions negatively impact a company's brand perception while green actions positively influence the brand perception. Non-green actions impact the brand perception to greater extent compared to green actions (Xie et al., 2015). It is therefore important to focus on sustainability and communicate about the green actions. Empathy is a valuable tool for sustainable communication. Such communication focusses on people and contextualizes the sustainable initiatives in an everyday way. The message needs to convey how the brand can contribute to the sustainability challenge. It is important that the target audience plays a central part in the communication. For instance, advertisements educating consumers how minor changes can make a big impact, increases the effectiveness of the advertisement by 19% (Ipsos, 2023b). Such sustainable communication not only influences brand perception but also positively impacts consumer's sustainable shopping behaviour via customer engagement (Bălan, 2020).

TYPES OF CONSUMERS AND CORRESPONDING SUSTAINABILITY COMMUNICATION

Not all consumers are the same and they require personalized communication tactics. Consumers can be segmented based on their level of concern and engagement regarding sustainability. Ipsos segmented consumers into five segments: disengaged denialists, busy bystanders, conflicted contributors, pragmatists, and activists, listed from lowest to highest level of concern for environmental sustainability. There are various articles about consumers segmentation, but this thesis highlights the Ipsos segmentation because it presents a global overview, is recent and has a large sample size. Ipsos studied 15 markets across all continents and asked 10,000 adults aged 16-74 to contribute to this study in the form of a survey (Ipsos, 2022b). Of note, segmentation hides nuances regarding a consumers' profile, challenges, and opportunities. Therefore, all following conclusions should be viewed as general statements about segments rather than being true for each consumer within a segment.

ACTIVISTS

Activists account for 17% of the population. They have the highest level of concern for the environment and are most engaged with this topic. This segment is skewed towards younger females, who are most likely to engage in lifestyle changes in order to be more sustainable. They are often highly literate about environmental sustainability but struggle to navigate the various trade-offs of living a sustainable lifestyle. The activists often have a signalling role to society by passively educating others and normalising behaviour that might be unfamiliar to others in their community. The challenge with this segment is that these people are holding companies to their promises. Companies involved in greenwashing will therefore be called out by activists. Activists are most likely attracted to rebellious and disruptive companies. If companies want to engage activists, they need to embrace sustainability and should incorporate it in their DNA in a high impactful manner.

PRAGMATISTS

Pragmatists account for 29% of the population and are comprised of the wealthy boomer generation. They have an elevated level of concern for the environment but are slower than activists to act on this concern. They look for everyday sustainable solutions at home and need little support in making behavioural changes. However, they are critical of brands that fail to support sustainable behaviours they deem important. They believe that the changes they made can have considerable impact, but their actions are often misaligned to be truly effective. This is indicative of the believe-true gap, which requires education to overcome. There is a lot of potential in this segment since they have resources and willingness to become more sustainable. Pragmatists are willing to spend a premium price for sustainable products if they recognize that companies take their responsibility and have a sustainable focus. They could thus make more impact if trusted brands educate and guide them into making behavioural changes in their everyday life.

CONFLICTED CONTRIBUTORS

18% of the population can be attributed to conflicted contributors. They are concerned about the environment, but they are unable to behave in a sustainable manner due to their financial situation. The challenge for this segment is providing sustainable alternatives without having to compromise financially. In terms of communication, conflicted contributors require empathy for their situation paired with tangible and relevant solutions. If you want conflicted contributors to be engaged with sustainability, sustainability should be presented as a co-benefit without having to pay more for a product. In order for brands to reach the conflicted contributors, they need to remember that price prevails. Brands can persuade this segment into making more sustainable decisions if it costs the same as the alternative.

BUSY BYSTANDER

With 16%, the busy bystanders is the smallest segment. This segment is skewed towards millennials working full-time. They are less concerned about sustainability and therefore less engaged with the topic. They do acknowledge their passive attitude but think climate change is overblown. This segment senses barriers towards acting on sustainability like inconvenience, the requirement of effort and the low priority, most likely due to their occupied lifestyle. Like the pragmatists, they need additional education to challenge their assumptions. They need to recognize the urgency of climate change and sustainable behaviour in order for them to act more sustainably. The dynamic and format in which sustainability is delivered and the friction it takes to act sustainably determines the engagement of these busy bystanders.

DISENGAGED DENIALISTS

This segment is least concerned and least engaged, accounting for 19% of the population. They do not recognize the environment as an (immediate) concern or believe the topic is largely overblown. Therefore, they are less inclined to take individual action regarding sustainability. This segment is difficult to convince about the urgency of sustainable behaviour. They require a personal approach without spiking a judgemental discussion. Communication wise, they are more open to products where sustainability is presented as a co-benefit rather than the main benefit. Furthermore, in order to increase concern for the environment and engagement, the sustainability message should be connected to topics that matter to them to create a common ground and understanding.

SUSTAINABILITY ATTITUDE EVOLVES OVER TIME

Personal concern is an important trade to foster behavioural changes (Hopwood et al., 2021). Although worldwide statistics are interesting and give substantial insights, Etos operates in the Dutch market and therefore Dutch insights are more insightful. Sustainability is not a taboo anymore and is sometimes or often discussed amongst friends and family, indicating a rising concern. In the SBI survey of 2023 it became apparent that a larger share of Dutch people discusses sustainability, 73% (SBIndex, 2023). This is the highest score compared to Sweden, Norway, Denmark, and Finland and has risen 5% since 2022. The increasing concern and accessibility of sustainability led to changes in peoples' behaviour. The SBI also segmented consumers regarding sustainability. The ego group resembles the disengaged denialists, moderate is similar to the busy bystander and conflicted contributors, smart resembles the pragmatists and dedicated are the activists. They observed a change in segmentation in the Netherlands throughout the years. The ego group is unchanged. The moderate group declined from 47% in 2017 to 38% in 2023, in favour of the smart and dedicated group. The smart group remained stable over the years. Lastly, the dedicated group increased from 9% of the population in 2017 to 17% of the population in 2023. These results indicate that Dutch people increasingly behave sustainable.

Etos need to realize who their target customer is, and which segments would be attracted to the current and future Etos in order to communicate in an adequate manner. If that becomes clear, the way Etos want to communicate about sustainability can be adjusted accordingly, both with conscious and subconscious communication. Conscious communication informs, educates, and activates both consumers and employees and subconscious communication influences consumers in a more passive manner. This subconscious communication will be elaborated on in the next section.

INFLUENCING CONSUMERS WITH NUDGING

Organisations use marketing as a communication tool to influence consumers decision-making. This could also be used for sustainability purposes. The way sustainable products are positioned and presented in stores, flyers and on the website could nudge consumers towards buying more sustainable products. Nudging is defined as any modification of or addition to the environment that influences the consumers in a predictable way, without changing economic incentives (Wilson et al., 2016). There are different types of nudges that can be classified as increasing salience, social-norm messaging and simplification (Bauer et al., 2022). Increasing salience has the purpose of increasing consumers attention towards a product or display. It ensures a product draws attention and stands out relative to the surroundings. This is often accomplished with contrasting features like colour, orientation, or intensity. Sustainable products are already increasing salience trough product packaging, but this can also be accomplished for store displays (Ischen et al., 2022).

Social-norm messaging focusses on conveying a message about social expectations regarding appropriate behaviours. This nudge responds to peoples' herd behaviour and need for social acceptance. In case of sustainability, this type of nudge is somewhat controversial. On the one hand positive normative messaging can contribute to increased implementation of sustainability efforts. However, sustainability efforts often cause conflicted social norms due to economic factors. A group of people, like the conflicted contributors, is unable to invest in sustainable alternatives and this creates negative normative messaging, which negatively influences sustainability implementation (Ge et al., 2020). Therefore, the use of social-norm messaging is not further explored in this thesis.

The last nudge is simplification, it is the principle of reducing effort, making the customer experience as easy as possible. This can be achieved by categorizing products, this eases the search and gives a clear overview. These types of nudges influence shopping behaviour in a predictable manner and is used in many organizations, such as supermarkets. In-store Albert Heijn for instance has a biological aisle and green caps on price tags to draw attention to vegan and biological products. They use labels and tags in the flyer for biological, vegan and 'animal friendlier' vegetables, fruit, meat, and fish. Additionally, this flyer categorizes some sustainable products in themes like 'breakfast à la vega' and 'together better for animal welfare', where a differentiating colour is used for the page (*Albert Heijn Bonusfolder Online Bekijken | AH.Nl*, n.d.). Albert Heijn is also present on social media and there they inform consumers about healthy nutrition and sustainable initiatives. They categorize and colour coordinate these initiatives in their Instagram Highlights to increase the ease of finding the videos (*Albert Heijn (@albertheijn) • Instagram Photos and Videos*, n.d.). Influencing customer purchasing behaviour with these nudges have proven to be effective for increasing vegetable and fruit sales (Bauer et al., 2022).

COMMUNICATION MODEL

Aside from the previously mentioned communication channels, companies increasingly focus on the digital environment as communication tool. This environment includes websites, social media, blogs, communities etc. More importantly, companies finally recognize the added value of digital media for sustainable communication. Sustainable communication refers to all types of marketing and corporate communication about sustainability issues (Siano et al., 2016). The purpose of sustainable communication is conveying a company's commitment for sustainability, whilst avoiding the gap between promises and expected results. Communication about sustainability via the digital environment enables companies to meet stakeholders' expectations for transparency regarding CSR. Consumers have become the main stakeholder for sustainable communication (SanMiguel et al., 2021). Today's technological developments in images, videos and interactive tools help a broad range of consumers understand the message of sustainable communication. This provides opportunities for increased public awareness and engages stakeholders in the company's sustainability performances. Despite the upsurge of interest in sustainable communication in the digital environment, models evaluating the online sustainable communication remain limited.

Siano *et al.* developed a scoring method to assess the communication about sustainability on corporate websites on four pillars: orientation, structure, ergonomics, and content (Figure 1)(Siano et al., 2016). Orientation focusses on highlighting the business philosophy and core values regarding ESG. Structure refers to elements supporting the credibility of information and relation with website users. Ergonomics highlights the ease of navigation on the website to find the desired content. Lastly, content scores the quality of the information on the website. Each pillar has a variety of subdimensions and corresponding criteria. A total of 64 criteria are scored. Assessing each criterion, resulting in a total sustainability communication score, enables companies to improve specific criteria belonging to subdimensions and pillars. Moreover, assessing the sustainability scores of various companies allows for a comparison between the companies regarding sustainability communication. However, this model stems from 2016 and a variety of innovations has changed operations on the website, like content marketing and videos.

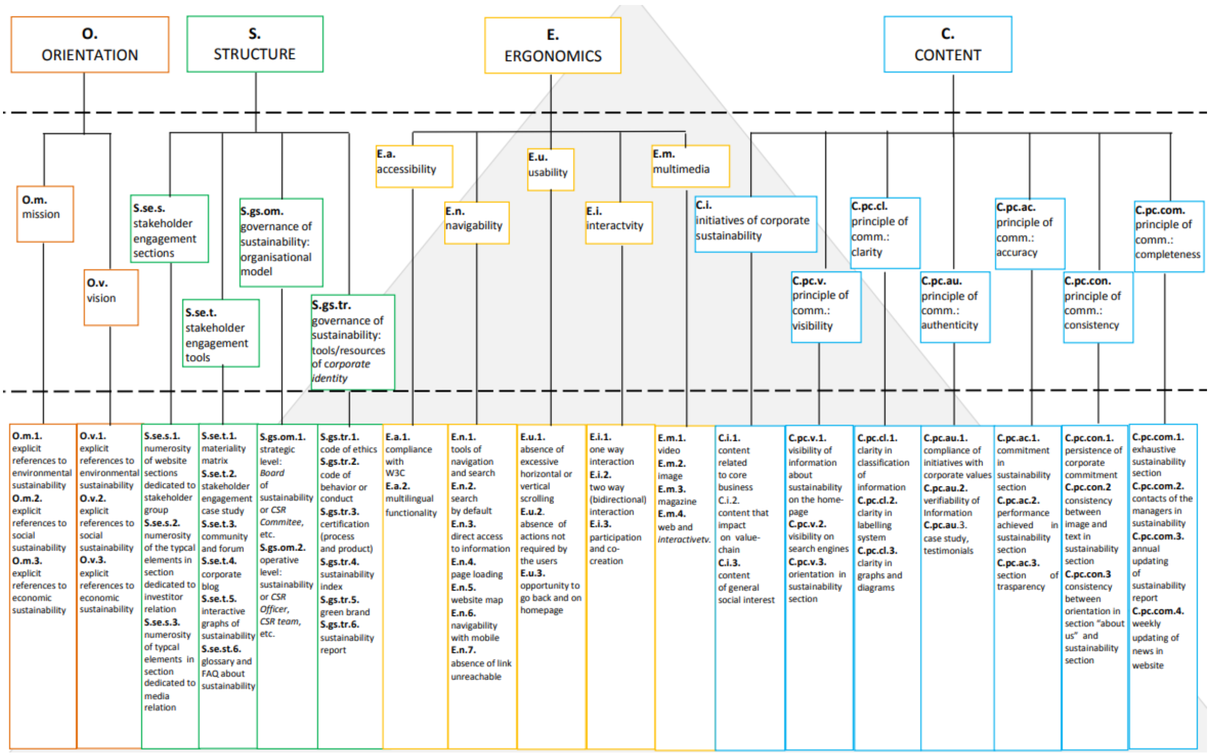

Figure 1: Sustainable communication model of Siano *et al.* This model contains 4 pillars, 18 subdimensions and 64 criteria. Companies are scored on all of the criteria listed in the lower half of the figure in order to quantify the sustainable communication into a score.

The sustainable communication model of SanMiguel *et al.* complemented the original model of Siano *et al.* with additional criteria (SanMiguel et al., 2021). They updated several criteria to match the latest digital innovations and added a number of new criteria. These are primarily grouped under the content pillar and focus on retail specific content with an eye for the main stakeholder, the final consumer. A total of 99 sustainability communication criteria are included in this updated model. Both the models will be the foundation of the communication model used in the practical research part of this thesis.

GREENWASHING

As described in the previous sections, communication is a powerful tool to convey a message and impact consumers' behaviour. However, the distribution of dishonest information from companies to consumers about sustainability has resulted in a suspicious consumer. Some companies genuinely wanted to inform society about their sustainability efforts and results, while others exaggerated their effort to be perceived as sustainable. This dishonest information with regards to sustainability was named greenwashing. When consumers label corporate claims as greenwashing, it has detrimental effect on the organisational and product perception (Szabo & Webster, 2021). The SBI report of 2023 published the share of Dutch consumers that either trust or mistrust brands' sustainable communication. Consumers are more positively tuned towards sustainable communication in 2023 compared to 2022, 40% and 33% respectively trust sustainable communication (SBIndex, 2023). Despite this positive news, the percentage of Dutch consumers who mistrust sustainable communication has remained largely stable since 2021, now at 28%. 1 Out of 4 consumers mistrusting sustainable communication is a cause for concern. Besides the reputational damage caused by perceived green washing, the legal action, or fines are also to be considered. Politics are increasingly involved with becoming more sustainable and try to tackle the problem of green washing. As mentioned before, as of 2024 most companies will be obligated to report on their actions with regards to sustainability. France made it even more tangible with the expected legislation of carbon labels on textiles (McKinsey, 2023). This will help consumers make a more informed decision for their purchases. There is also a proposed bill in the European Commission, green claims directive, which dictates the communication of green claims to empower consumers in the sustainability transition (European Commission, n.d.-b). These initiatives also help counteract greenwashing initiatives since statements need to be backed by data.

METHOD:

NUDGING AND COMMUNICATION ABOUT SUSTAINABILITY POLICIES

This method section aimed to answer the question: How does Etos currently communicate about sustainability in-store, in the flyer and on social media, compared to Dutch competition? Consumers are influenced in a predictable manner via nudges. The presence of these nudges and the communication about sustainability policies was assessed in physical stores, in the flyer and on social media. In order to gain more insights how Etos performs compared to Dutch competition, the store, flyer, and social media of Kruidvat, Holland&Barrett, Trekpleister and Da was also assessed on the presence of nudges and communication about sustainability policies.

IN-STORE

The current status of sustainable communication in supermarkets was inspiration for research in Dutch drugstores. Assuming format is supposed to be the same in all stores, only one store per drugstore brand was visited to draw conclusions about the in-store sustainability communication, all on the 27th of March. The displays were analysed on the following points: Salience was scored on the presence of labels and tags on the display about sustainable product features; and the use of colour in the display to indicate sustainable products. Simplicity was scored on the presence of an 'only sustainable products' display and/or shelf to increase the ease of finding sustainable products. This criterion is based on the biological shelving at supermarkets. These five drugstores are located in Gorinchem, except for Trekpleister, which is located in Hardinxveld-Giessendam.

These store visits were also used to describe the level of information provided in-store to consumers about an organization's sustainability policies, such as the use of sustainable energy; reducing recycled plastic; recycled paper; reducing energy usage and activating consumers to be sustainable at home. This information could influence consumers' perception about the sustainability of the organization.

FLYER

For all five drugstores, the online flyer was reviewed in week 13. The flyers sustainable communication is scored on the salience and simplicity nudge. Salience was scored on the use of differentiating colour to indicate sustainable products and on the presence of labels and tags about sustainable product features. Simplicity is scored based on the presence of a sustainable category in the flyer. Additionally, organizational sustainability policies that are communicated in the flyer were described. This all indicates the level of sustainable communication in the flyer and was used to compare the different drugstores with each other.

SOCIAL MEDIA

For all five drugstores, Instagram and TikTok posts from 29th of March 2022 till 29th of March 2023 were reviewed on the presence of salience and simplicity nudges. Salience was scored, on the use of differentiating background colours indicating sustainability focussed products or videos, and on the mentioning of sustainable product features in the content, like the caption, photo, or video. Simplicity is scored based on the presence of some sort of categorisation, such as Instagram Highlights. Instagram Highlights is a function where stories can be saved and re-watched. In addition to this scoring method, communication on social media about sustainability policies were described.

SURVEY: CONSUMER SUSTAINABLE SHOPPING BEHAVIOUR AND EMPLOYEES CONSULTING ON SUSTAINABILITY

A survey was conducted internally at Etos for a total of two weeks to reach the store employees, from 27th of March until the 11th of April (Appendix 1A). To draw attention to the survey, a message on the internal online communication platform sam.ahold.com was posted and an additional message in the newsletter for store employees. The aim of this survey was twofold, gain insight into consumers' shopping behaviour and in employees' knowledge regarding sustainability. As described before, the theory of planned behaviour revealed the say-do gap (Strong & Long, 2021). Since companies want to act more sustainably while making a profit, consumer behaviour regarding sustainability might be equally as important as their intentions. Therefore, this thesis survey focusses on consumers' behaviour observed by store employees. Some of the questions also focusses on the topics consumers act on most. This is indicated based on sustainability topics consumers ask most questions about. Furthermore, this survey intended to gain information about the employees' knowledge about product and Etos' sustainability policies, and to what degree they implement this knowledge when giving consumers consults. Therefore, some questions focus on the influence of consults on purchases and on the extent employees use their knowledge about sustainability in such consults. Additional aims of the survey were to describe if there are differences in consumer behaviour throughout the Netherlands, and if employees' knowledge about sustainability and the use of it in consults varies for different job functions, provinces, or organisation structures (company owned vs franchise) This survey answers the following sub-questions: To what extent employees informed about sustainable initiatives and product information? And to what extent is consumer shopping behaviour influenced by sustainability, including sustainable consults? The survey questions are included in Appendix 1A, all questions were mandatory to answer except for the open questions.

This dataset contains both nominal and ordinal variables, no numerical variables. Due to the origin of the variables, no mean can be calculated, only modus and the median. Normally, nominal, and ordinal data would indicate a Chi-Square test of independence statistical test. However, one of the criteria for this test is the minimal expected frequency of five in each cell (McHugh, 2013). Since the sample sizes for province, organisational structure and function within Etos have a high variance, the minimal frequency of five per cell is not met. Therefore, no statistical test could be performed to determine if there is a dependency between provinces, organisational structure, functions, and the actions of employees regarding sustainability or between province and the observed consumer behaviour. Some thresholds were set to be able to describe possible differences between provinces, function, and organisation structure. The minimum number of respondents per province, function or organisation structure was set at ten, lower frequencies were excluded from comparisons. Additionally, the difference between the lowest and highest scoring variable needed to be higher than 10% in order to speak of a difference between province, function, or organisation structure. The median and modus give insight whether the general opinion varies between provinces while the 10% difference within a scoring category indicates the polarisation of the distribution. Polarisation means that dissimilar attitudes are adopted, in this study it is interpreted as a weak or strong preference for a certain scoring category compared to other provinces (Heltzel & Laurin, 2020).

It was possible to execute the Chi-Square goodness of fit test for the generalized data. The expected values of all categories were equal, and the p was set at 0.05. The null hypothesis was that data was-evenly distributed across categories across the population (IBM, n.d.). When the p is <0.05 the null hypothesis can be rejected, and a statement can be made that not all categories are equally represented. This test was performed for every question of the survey with the total data set. Categories within a question are numbered either 1-5 or 1-4. 1-5 Was used for categories Fully disagree – Fully agree, Never – Always, Not at all – Absolutely (important or determinative), Less than 1x per month – Multiple times per month. Ranking 1-4 was used for the category No, never – Always.

COMMUNICATION MODEL

The communication model used in this thesis is composed using three articles and my own inspiration (Naidoo & Gasparatos, 2018; SanMiguel et al., 2021; Siano et al., 2016) (Appendix 2: Table 2). It will help answer the sub question: How does Etos communicate about sustainability on their website compared to the Dutch competition and compared to Boots? This model contains pillars, subdimensions and criteria. Each criteria refers to the article this criteria originates from (Appendix 2: Table 2). The pillars: orientation, structure, ergonomics, and content, are identical to the original models discussed in the communication model section on page 17-18, (Siano et al., 2016). The pillars orientation and content are sustainability specific, whereas structure and ergonomics mostly focus on the features on the website in general. This model is a simplified version focussing on environmental sustainability, meaning that subjective criteria and criteria concerning other fields of sustainability were excluded. Since I am the only one assessing the criteria, subjective criteria will provide little trustworthy information. Furthermore, some criteria are not publicly available and could therefore not be assessed. I added four criteria to the model that are important to Etos. Two criteria focus on activating and educating consumers and two include salience and simplicity nudges. This model totals to 42 criteria that were scored dichotomous as either present or not (Appendix 2: Table 2). All criteria have the same weight factor and a score of 42 equals 100%.

An important note is that the outcomes of this model should be viewed as indicative and not scientific or statistically significant. I assessed the criteria myself and some criteria are open to interpretation. In the attempt to provide openness and transparency, my interpretation of these criteria was described below. Furthermore, although I strived to include objective, dichotomous criteria only, it does not fully cover the difference in quality of sustainability communication between companies. Therefore, the nuances and criteria requiring further explanation per company were described in the results section.

Criteria open to interpretation and requiring further clarification are explained in this paragraph. Orientation is divides into two subdimensions: About us and sustainability web section. About us assesses if sustainability is mentioned in the company description, mission, or vision. Sustainability web section is a separate link where they elaborate on sustainability. Ergonomics is divided into several subdimensions, and multimedia includes the criteria video, image, and magazine. Since this thesis focusses on sustainability communication, these criteria were scored based on the presence on the sustainability page rather than throughout the website. The criteria further information available, belonging to the subdimension navigability of the pillar ergonomics is also focused on the sustainability page. This provides better information on the use of multimedia and further information for sustainability communication. Content is the largest pilar and one criterion is sustainable product traceability. This is a broad concept, and it is difficult to trace the entire value chain without all the data, therefore this criterion is assessed on the accountability of resources like palm oil, paper etc. The criteria: consumer-oriented content and text assesses the readability for people with a basic level of sustainability and drugstore understanding, and the absence of jargon.

The sustainable communication of seven companies will be assessed using this model. Noteworthy points were described per company to provide further context. The total scores were compared to the scores of the other companies, and this resulted in a ranking. Without context the percentages hold no meaning, therefore score ranges were used to connect a value to the percentage (Siano et al., 2016):

- A score of >80% shows excellent compliance with the sustainability criteria.
- 70-79% indicate satisfactory fulfilment of sustainable communication criteria.
- 60-69% represent acceptable compliance with sustainable communication criteria. Actions for improvement are possible in different dimensions.
- 50-59% show weakness in the company's sustainability communication in the digital environment. Multiple changes are required to prevent reputational risks.
- <49% represents poor compliance with the sustainable communication criteria. The strategy and practises for digital sustainable communication need to be revised.

RESULTS

NUDGING AND COMMUNICATION ABOUT SUSTAINABILITY POLICIES

When looking at the total of sustainability communication, in-store, in the flyer and on social media it becomes apparent that Etos is neither outperforming nor underperforming compared to their Dutch competition (Table 1). This table shows the presence or absence of the sustainability nudges, a total of 9 points could be obtained. Trekpleister score 1 out of 9 on sustainable communication, Etos, and Holland&Barrett 2 out of 9, Da 3 out of 9 and Kruidvat 4 out of 9. Etos only communicates about sustainability on social media, whilst Kruidvat has some form of sustainability communication in all channels. The in-store sustainability communication of all drugstores combined ticks most boxes, a total of 6 out of 15, social media 5 out of 15 and flyer underperforms with 1 out of 15. Etos needs to step up their sustainability communication in-store to prevent falling behind on competition, keep up their sustainable communication efforts on social media, and could use the flyer as a channel to differentiate from the competition.

Table 1: Market research on the presence of nudges in-store, in the flyer and on social media. The nudges are scored as being either present (Yes) or absent (No).

Presence of nudges	Nudge	Etos	Kruidvat	Holland&Barrett	Trekpleister	Da
In-store	Increased salience (colour)	No	No	No	No	Yes
	Increased salience (tag/label)	No	Yes	Yes	Yes	Yes
	Simplicity (categorisation)	No	No	No	No	Yes
Flyer	Increased salience (colour)	No	No	No	No	No
	Increased salience (tag/label)	No	Yes	No	No	No
	Simplicity (categorisation)	No	No	No	No	No
Social media	Increased salience (colour)	No	Yes	No	No	No
	Increased salience (content)	Yes	Yes	Yes	No	No
	Simplicity (categorisation)	Yes	No	No	No	No
Total score		**2**	**4**	**2**	**1**	**3**

IN-STORE

The store visits provided information about the way Etos and Dutch competitors nudge consumer purchases towards sustainable products. The general remark about drugstores is that there is little nudging towards sustainable products. When there are tags and labels about sustainable product features, they are concentrated in the make-up department. Most of the sustainability claims include natural ingredients, vegan, sustainable packaging and free from microplastics. The nudge of simplification does not receive much attention in drugstores.

Etos is the drugstore with the least consumer influencing and communication to promote sustainable purchasing. There were neither labels, tags, or categories to increase salience or simplification, nor information about sustainable policies. Etos thus falls behind on in-store communication and consumer nudging towards sustainable product purchasing compared to the competition.

Kruidvat is the drugstore with the most abundant tags and labels about sustainable product features. These tags are primarily present in the in the care and beauty sections. Almost all brand in the beauty section had tags and labels to communicate their sustainability efforts. In my opinion, this was too extensive and counterproductive for drawing consumers' attention. Kruidvat did communicate about their energy conservation initiatives and promoted the bring-your-own bag initiative, which could activate consumers to become more sustainable.

Holland&Barrett utilized the type of nudges minimally. The only attention paid to sustainable products was the occasional banner referring to natural ingredients. The lack of attention for sustainability could be due to the already 'green' image of Holland&Barrett and the primarily sustainable assortment. Furthermore, they do not communicate about additional sustainable policies. These observations could be explained by the already sustainable image of Holland&Barrett, which prevents them from having to highlight their sustainable efforts and products.

It appears that Trekpleister only uses the occasional salience nudge of labels and tags, concentrated in the make-up section of the store. Besides product sustainability, Trekpleister also informs the consumers about their sustainable policy. Examples are, 'the door is closed to conserve energy' and 'this display runs on sustainable wind energy'. This way Trekpleister informs their consumers about sustainability initiatives.

Da is the only drugstore that made use of the simplification and increased salience nudge. Da has brand specific tags and labels about sustainable product features throughout the store, instead of only in the make-up department. Furthermore, they nudge consumers to buy sustainable private label care products by positioning them on one display and giving the display a green coloured band, which increases both the salience and simplicity. Besides these types of nudges, they also communicate about their sustainability initiatives such as a poster on the window to communicate their closed-door policy to conserve energy. Da thus utilizes two different types of nudges to influence their consumers' shopping behaviour.

FLYER

In general, all drugstores' flyers make use of differential colours and categorizing products based on their departments, like beauty, vitamins etc., but not for sustainability. Based on the application of nudges to increase sustainable awareness, the flyer focusses considerably less on sustainability compared to in-store communication.

Etos does not focus on drawing attention to sustainable products in the flyer. The flyer is designed according to the “Hé-Le-Maal Los" campaign and is composed of 29 pages. Etos uses green promotion labels for new products and green pages to categorize and indicate products from the category medicine, but sustainability is not included in these green attention grabbers. Again, Etos acts the least on communication about sustainable products in the flyer compared to the competition.

Kruidvat's flyer contains 85 pages, which is the largest flyer out of the five drugstores. They do not necessarily focus on sustainability with colour or by categorizing sustainable products. However, they do communicate about the sustainability of the flyer itself, it can be recycled and is made of PEFC certified paper. They also allow their suppliers to design half a page to convey their brand specific message. Some brands choose to include sustainable tags and labels in this message, therefore Kruidvat scored positive on the presence of labels and tags concerning sustainable features.

Like Etos, Holland&Barrett's and Da do not include sustainable communication. The flyer of Holland&Barrett is 19 pages thick and Da has an 18-page flyer. As mentioned before in the in-store section, the lack of sustainable communication from Holland&Barrett could potentially be explained by the ‘green’ image of Holland&Barrett. This image could enable them to be perceived as sustainable without additional focus on sustainable communication. There is a vast contrast in the sustainable communication in-store and in the flyer for Da, instore-communication ticked all boxes for sustainable nudges and the flyer lacked all communication about sustainability.

Trekpleister does not communicate about sustainability other than the sustainable feature of the flyer itself. This 16-page flyer can be recycled and is made of PEFC certified paper, like Kruidvat. A possible explanation why Kruidvat and Trekpleister communicate about this initiative could be due to them both being part of the A.S. Watson Group. Such groups often impose rules and guidelines throughout the member brands to create uniformity.

SOCIAL MEDIA

Social media has become a focus for many companies to convey messages to consumers, however, not all drugstores jumped on this trend. Da and Trekpleister are only present on Facebook and communicate nearly nothing about sustainability. In general, most other drugstores’ communication is product focussed when it comes to sustainability. Besides, communication about sustainable product features, Kruidvat is the only drugstore that communicates about their sustainable policies. The increased salience (content) scores best across the five drugstores. This is primarily due to the information posted in the caption, the presence of labels and tags in the photos or videos is extremely limited. In general, social media is more frequently used for sustainable communication than the flyer.

Etos communicates more about sustainability on social media than in-store and in the flyer. The origin of the sustainable communication was focussed on product features and not on sustainable Etos’ policies. Especially on Instagram and Facebook, private label product with sustainable features were introduced throughout and the sustainability of the products was highlighted in the photo and/or in the caption. However, the mentioning of these sustainable product features was not included in every post about the same product. Often, only the introductory post highlighted the sustainable attributes.

When these products recurred in newer posts, sustainable aspects were not mentioned again. TikTok also included sustainable product features in their posts, but the ratio product introduction vs tutorial was lower. Therefore, the frequency of post including sustainability was lower. Furthermore, the Instagram, Facebook and TikTok posts about sustainability did not use a differentiating colour, which prevents users from recognizing sustainable products from the homepage. The sustainable origin of products only became apparent after clicking on the post. Lastly, Etos applied the Instagram Highlights to present a sustainable topic, called 'Vegan Friday'. This is an easy tool to see the vegan products highlighted in Etos stories. Etos thus utilizes social media to communicate about sustainable products features and nudges people with increased salience and simplicity, but their efforts are not visible from the homepage.

Kruidvat communicates about sustainability on Instagram and Facebook and utilizes increased salience nudges. They are not present on TikTok, apart from individual stores having an account featuring their employees. Since this is not an official Kruidvat account, these store accounts were not further considered for the social media analysis. Kruidvat posts about both sustainable products and policies. They mention their sustainable company clothing, energy conservation measures and introduction of the sustainable shopping bag, which is made from 90% recycled plastic. Moreover, they also give their followers tips to become more sustainable at home, like bringing your own shopper, separating waste products, and using all of the product before discarding it. These posts with sustainable information draw attention because of the use of differential colour and tags and labels. The labels are in the form of text in the videos to highlight sustainable features and initiatives. The colour and labels are visible from the homepage, which enables followers to recognize posts that feature sustainable products and information. Kruidvat thus fully uses the increased salience nudge to inform followers on social media about both sustainable product features, sustainability tips and their sustainable policies, and this is all visible from the homepage.

Holland&Barrett posts mainly about health rather than sustainability, for both Instagram, Facebook and TikTok. The occasional post introducing products include sustainable features in the caption. The posts that include sustainability cannot be recognized from the homepage, because neither differential colour, categorization nor labels are used to draw attention to these posts. Noteworthy is that captions for product introductions mainly focus on the natural ingredients, biological and vegan rather than sustainable packaging. Holland&Barrett thus communicates about sustainable product features with text in the caption, however, there are no colours or labels to draw attention to sustainable products.

Trekpleister and Da are only present on Facebook where they communicate about product promotions and give-aways and health concerns. Company owned accounts from Instagram and TikTok were present but excluded from this analysis. Both drugstores do not utilize these posts to highlight sustainable product features. Da does not mention sustainability on this social media channel at all, while Trekpleister only post about sustainability in the past year focussed on their new shoppers made from recycled plastic. This lack of sustainable communication is in line with both drugstores' flyers.

SURVEY: CONSUMER SUSTAINABLE SHOPPING BEHAVIOUR AND EMPLOYEES CONSULTING ON SUSTAINABILITY

A total of 240 respondents completed the survey, the data can be released upon request**.** First some general remarks about the results will be presented, then a more in-depth analysis of the data accompanied with a critical view of the results. For the in-depth analysis, the 240 respondents are categorized based on province, function, and organisation structure (Appendix 1B: Table 1). The majority of the respondents are Store managers, followed by Service&Sales leads, Sellers, Entrepreneurs and Store clerks. More than two thirds of these employees work at Etos-owned stored rather than franchises. This could be concluded from the first number of the store numbers. Every store starting with a 6 or 8 is a franchise and every store starting with 7 is an Etos-owned store. Furthermore, every province is represented in this survey. Drenthe is least represented with 3 respondents and Brabant is best represented with 54 respondents. As mentioned in the method section, the data can be categorized as nominal and ordinal, there are no numeric variables. Because of the origin of these variables no means can be calculated, only median and modus. The high variance between all groups prevents the use of a Chi-Square test of independence statistical test for the dependence of function, organisational structure, and province. Therefore, these results will only state percentages, the modus and median. No statements can be made about the significance of the differences between groups. The expected frequencies of the generalized data were large enough to perform the Chi-Square goodness of fit test to determine if the data is evenly or unevenly distributed across categories. The Chi-Square goodness of fit test of all survey questions concluded a rejection of the null hypothesis (Appendix 1C). Therefore, the data of all questions are not evenly distributed across categories.

CONSUMER SHOPPING BEHAVIOUR

Consumers somewhat value sustainability as important for their purchases, a normal distribution can be observed (Figure 2). The high variance in frequencies across categories is supported by the $p<0.001$, rejecting the null hypothesis of equal distribution (Appendix 1C: Figure 1). 55.8% Of the respondents think consumers value sustainability as a three on the one to five scale, this can be interpreted as Somewhat important. Both the median and the modus are also Somewhat important**.** Like the question regarding importance, the median and modus are somewhat important for the question whether sustainability is determinative in the purchase (Appendix 1C: Figure 2). When looking at the distribution of the data in the figure, a small difference in frequency can be observed in categories 1 and 2, and 4 and 5 (Figure 2). The frequencies of categories 4 and 5 are higher regarding the importance of sustainability compared to categories 1 and 2. The opposite is true for the question whether sustainability is determinative. This indicates a slight preference for considering sustainability important rather than determinative. Sustainability being important but not necessarily determinative could indicate a say-do gap, where the barriers influence the three beliefs towards a more negative intention regarding sustainability.

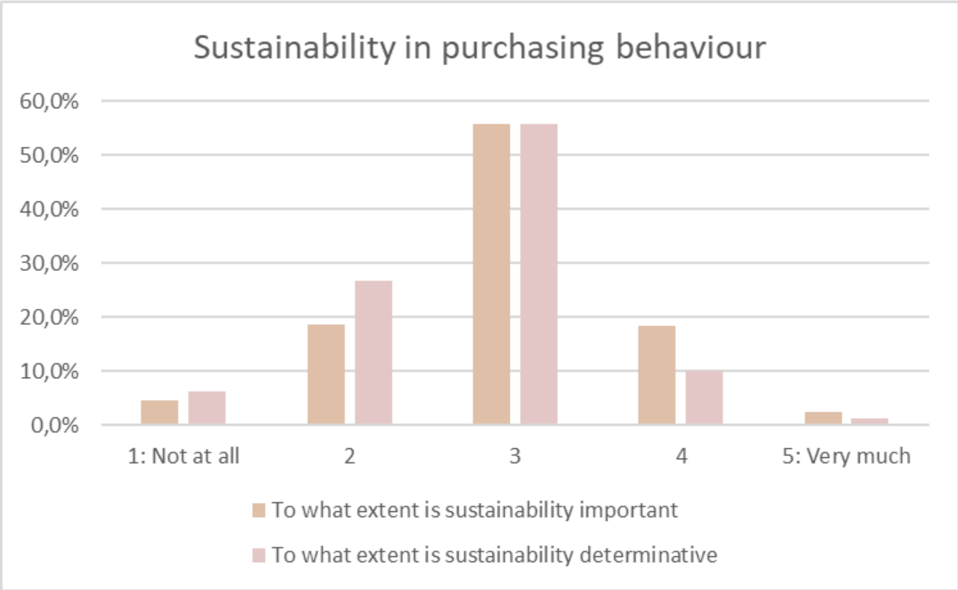

Figure 2: To what extent is sustainability important or determinative in consumers' purchasing behaviour? 240 Employees gave a score between 1 (not at all) – 5 (very much) about the nature of sustainability influencing consumers' purchasing behaviour. P<0.05.

The majority of employees have consumers asking questions about sustainability about once a week, the median is ranked about once a month (Appendix 1C: Figure 3). The data has a right skewed distribution, explaining the difference between median and modus (Figure 3). To place this data into perspective, it was categorised under contractual hours (Table 2). 8 Employees work 12 hours or less and was therefore excludes from further comparisons. There is a difference in scoring distribution between contractual hours and the sustainable question frequency. The modus for 13-24 hours is Less than once per month and the median About once a month. The modus and median of 24-32 hours are about once a week. The median for 32+ hours is About once a week, and the modus is both Less than once a month and About once a week. The only difference in polarisation of the distribution is in scoring category Less than once a month. These results indicate that working more increases the frequency consumers ask questions about sustainability. However, this is not a steady increase since the scoring distribution for employees working 13-24 hours indicate they receive questions more frequently than employees working 32+ hours.

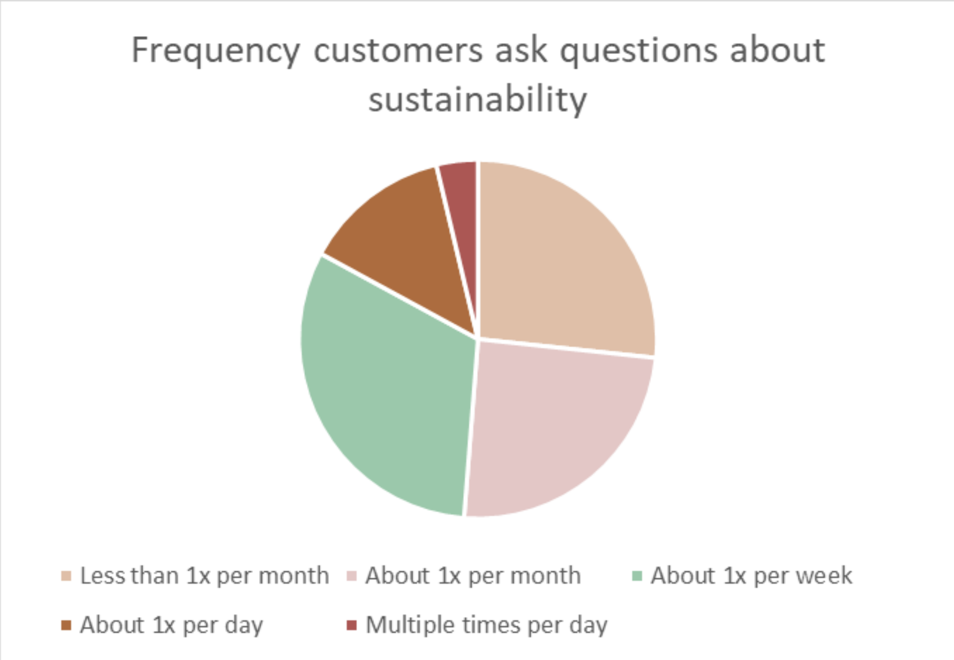

Figure 3: What is the frequency consumers ask employees questions about sustainability? 240 Employees gave a score, choosing between five categories, less than 1x per month being least frequent and multiple times per day most frequent. $P<0.05$

Table 2: What is the frequency consumers ask employees questions about sustainability, categorized in contract hours? A total of 232 employees were included in this table, categories with less than ten respondents were excluded from further analysis.

Sustainable Question frequency	Less than 1x per month	About 1x per month	About 1x per week	About 1x per day	Multiple times per day
Between 13 and 24 hours	34,4%	28,1%	28,1%	9,4%	0,0%
Between 24 and 32 hours	20,8%	25,5%	35,8%	15,1%	2,8%
More than 32 hours	29,8%	20,2%	29,8%	13,8%	6,4%

When analysing the sustainability topics consumers ask questions about, it becomes apparent that natural ingredients receive attention most frequently, with a mode and median of 4 which indicates the category Often. There are some differences in score distribution between the various topics, (Figure 4) (Appendix 1C: Figure 4-8). Microplastics rank second place with a mode and median of 3 equalising Sometimes. 80% Of the respondents scoring getting questions about microplastics Sometimes - Always. Both sustainable packaging and sustainable resources score over 60% on Sometimes – Always, both also have a mode and median of 3 which indicates Sometimes. Etos' sustainability policies scored highest as the sustainability topic consumers never ask about, with a mode of 1 and a median of 2, Never and Rarely respectively. Important to note the subjectivity of the scoring categories. Due to the way the question was asked, it leaves room for respondents' interpretation how many questions can be qualified as often for instance. An improvement to the question could be to specify the approximate number of questions qualifying per category. This would require keeping in mind the number of questions consumers ask employees about sustainability per month.

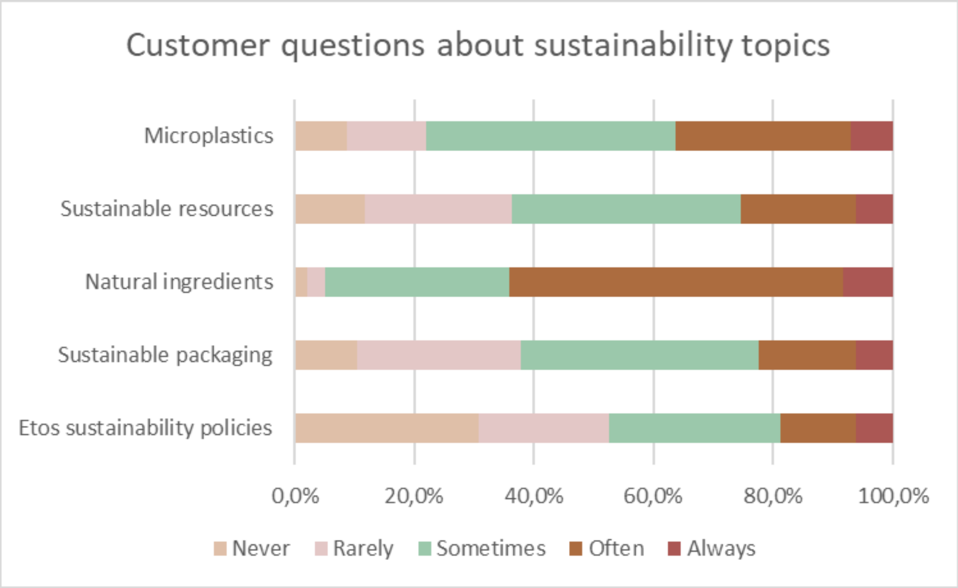

Figure 4: What sustainability topics are most popular in consumers' questions? 240 Employees scored all five sustainability topics on the popularity of the topic in consumers' questions. $P<0.05$.

COMPARING PROVINCES

The provinces Brabant, Gelderland, Limburg, Noord-Holland, Utrecht, and Zuid-Holland have more than 10 respondents and are therefore included in the province comparison (Appendix 1B: Table 1). Results indicate a slight difference on scoring the question: Do consumers think sustainability is important for their purchase? (Table 3). Limburg scores highest on the category 2 with 23.1% and Utrecht lowest with 10.5%, Utrecht scores highest on category 3 with 63.2% and Gelderland lowest with 51.6%. It appears that this difference can be partially explained by the polarised distribution in Utrecht. All provinces have modus and median of 3, like the general data. The polarisation of the distribution, whether sustainability is determinative, differs per province (Table 4). Similar to the general data and the question about importance, the modus and median are 3. Category 1-4 have a difference in provinces larger than 10%. The largest difference is in category 3 with Noord-Holland scoring 44.7% and Utrecht scoring 73.7%. Once more, this can be partially explained by the polarised distribution of Utrecht. Since the medians and modi of the provinces are identical to the generalized results, there is no province driven difference in general opinion about the importance and determination of sustainability in purchases. Both importance and determination score somewhat important across all provinces.

Table 3: To what extent is sustainability important or determinative in consumers' purchasing behaviour? 211 Employees gave a score 1 (not at all) – 5 (very much), provinces with less than ten respondents were excluded from further analysis.

Importance	1: Not at all	2	3	4	5: Very much
Brabant	1,9%	16,7%	59,3%	18,5%	3,7%
Gelderland	3,2%	19,4%	51,6%	22,6%	3,2%
Limburg	0,0%	23,1%	61,5%	15,4%	0,0%
Noord-Holland	8,5%	14,9%	53,2%	21,3%	2,1%
Utrecht	5,3%	10,5%	63,2%	15,8%	5,3%
Zuid-Holland	6,4%	21,3%	59,6%	12,8%	0,0%
Determinative	**1: Not at all**	**2**	**3**	**4**	**5: Very much**
Brabant	3,7%	29,6%	53,7%	13,0%	0,0%
Gelderland	3,2%	16,1%	64,5%	16,1%	0,0%
Limburg	0,0%	30,8%	61,5%	7,7%	0,0%
Noord-Holland	10,6%	27,7%	44,7%	12,8%	4,3%
Utrecht	10,5%	15,8%	73,7%	0,0%	0,0%
Zuid-Holland	4,3%	34,0%	55,3%	6,4%	0,0%

There is a difference between score distribution between provinces for the question how frequently do consumers ask questions about sustainability (Table 4). The modus of all provinces is about once a week, except for Utrecht and Zuid-Holland, with a modus of about once a month. The median is about once a week for all provinces, except Zuid-Holland with a modus of about once a month. Utrecht and Zuid-Holland thus deviate from the general and province specific distribution. Since Utrecht and Zuid-Holland have a divergent distribution, all score categories indicate differences between provinces. Of note, Utrecht scores highest on both the least frequent questions score and the most frequent questions score. This could imply that there are considerable differences between store employees within Utrecht. However, since the Utrecht has a sample size of merely 19, no absolute conclusions can be drawn from the distribution of this province. For the majority of the provinces the frequency in which consumers ask questions about sustainability is the same, about once a week, Utrecht and Zuid-Holland slightly incline towards about once a month.

Table 4: What is the frequency consumers ask employees questions about sustainability, categorized in provinces? 211 Employees gave a score: less than 1x per month – multiple times per day, provinces with less than ten respondents were excluded from further analysis.

Question frequency	Less than 1x per month	About 1x per month	About 1x per week	About 1x per day	Multiple times per day
Brabant	24,1%	24,1%	38,9%	13,0%	0,0%
Gelderland	12,9%	29,0%	35,5%	19,4%	3,2%
Limburg	23,1%	15,4%	30,8%	23,1%	7,7%
Noord-Holland	29,8%	14,9%	36,2%	10,6%	8,5%
Utrecht	36,8%	10,5%	26,3%	15,8%	10,5%
Zuid-Holland	34,0%	29,8%	23,4%	10,6%	2,1%

These province results give some insights whether there is a general consensus about sustainability throughout the Netherlands. No absolute conclusions can be drawn from this data due to the small sample sizes in the residual provinces. The importance and determinativeness of sustainability in a purchase is the same for all provinces, according to this data, and the questions frequency varies between about once a week and once a month. Since the consensus is generally the same for all provinces, recommendations from this report should also be viewed as applicable throughout the Netherlands and not restricted to some provinces.

EMPLOYEE'S SUSTAINABILITY KNOWLEDGE AND CONSULTS

Employees have the ability to consult consumers on their purchases and results indicate that consumers take this advice to heart. The mode is 3 and the median 2, corresponding to yes, regularly, and yes, sometimes respectively (Appendix 1C: Figure 9). This implies that consultation could affect the purchasing decisions of consumers. Considering this thesis focussing on sustainability the extent to which employees incorporate sustainability in their consults could influence the consumer's purchasing decision towards sustainable products. The result of the survey points out a median and modus of 2, corresponding with Yes, sometimes (Appendix 1C: Figure 10). The effect of consults on the purchase score higher on the categories yes, regularly and always (47%) compared to employees incorporating sustainability in their consults (19%) (Figure 5&6). This thesis does not research if there is a direct causation between sustainability incorporated in consults and an increase of sustainable product sales. However, if the number of consults that incorporate sustainability in them increases, it is possible this consult affects purchasing behaviour and results in more sustainable product sales.

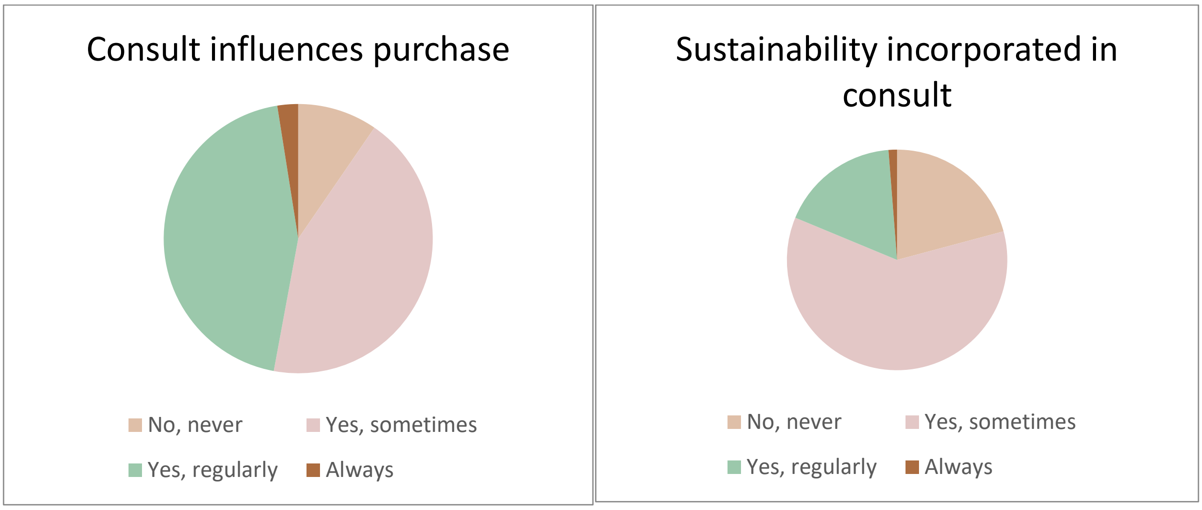

Figure 5 & 6: How often do consult influence consumers' purchase behaviour? & How often do store employees incorporate sustainability in their consults? 240 Employees gave a score: No, never – Always. P<0.05.

In order to give high quality advice about sustainability, knowledge about sustainability needs to be at a sufficient level. The median and modus for the statement "I have sufficient knowledge about sustainability to incorporate sustainability in consults." is 3, which resembles the category Neutral (Appendix 1C: Figure 11). Although 28% scores their knowledge positively and 20% scores their knowledge negatively, the majority of employees is neutral about their knowledge of sustainability (Figure 7). Again, this thesis does not study the correlation between knowledge about sustainability and whether sustainability is incorporated in consults. However, if employees felt more confident about their knowledge of sustainability, they might incorporate sustainability in their consults more frequently.

Figure 7: To what extent do store employees consider their sustainable knowledge to be sufficient to incorporate in consults? 240 Employees gave a score: fully disagree – fully agree. P<0.05.

When employees were asked whether they wanted to learn more about the sustainability topics, to incorporate this knowledge in their consults, at least 68% responded either Agree or Fully agree

(Figure 8) (Appendix 1C: Figure 12-16). The median and modus of all sustainability topics is 4, resembling Agree. 33.8% And 32.9% of employees even Fully agree with learning about Natural ingredients and Microplastics, respectively. This indicates the majority of employees have a positive attitude towards learning about all sustainability topics.

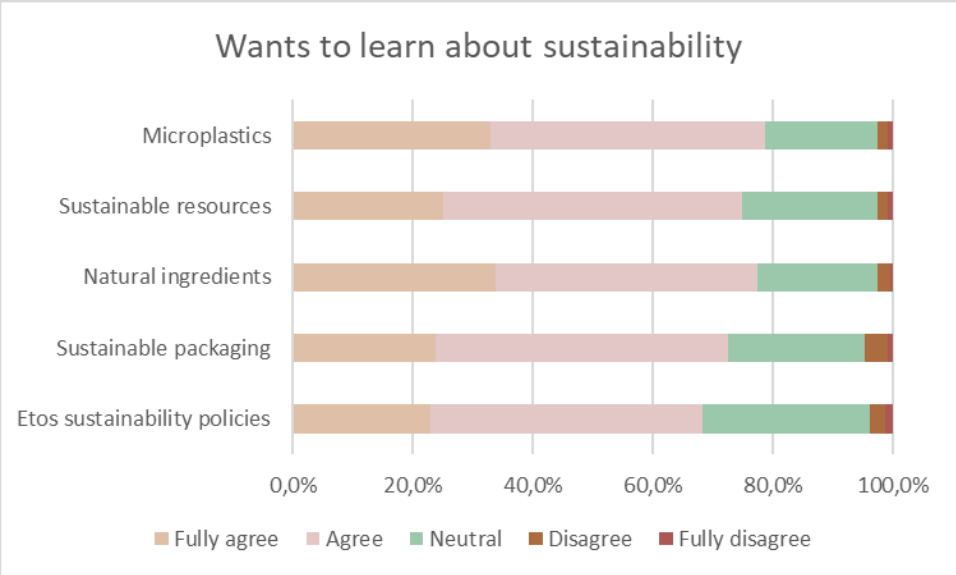

Figure 8: To what extent do store employees want to learn more about the sustainability topics? 240 Employees scored all five sustainability topics: fully disagree – fully agree. P<0.05

COMPARING PROVINCES

For the question, if employees recognize their consult in consumers' purchases, the modus is 3; Yes, frequently for all provinces, except for Brabant and Gelderland (Table 5). Brabant and Gelderland have a modus of 2; Yes, sometimes. Although the general results have a median of 2; Yes, sometimes, the majority of the provinces have a median of 3; Yes, regularly. This is due to the exclusion of provinces with a response rate lower than 10. The distribution polarisation varies across provinces for categories 2 and 3, Yes, sometimes, and Yes, regularly. When employees were asked if they incorporate sustainability in their consults, the mode and median was 2; Yes, sometimes, for all provinces, which corresponds with the general results. The polarisation of the distribution differs per province in categories 1-3, No, never and Yes, regularly respectively. These results indicate that there is no vast difference between employees in different provinces whether they incorporate sustainability in their consults. However, results also indicate a difference in provinces to what extent employees recognize their consult in consumers' purchases.

Table 5: How often do consult influence consumers' purchase behaviour? & How often do store employees incorporate sustainability in their consults?, categorized in provinces. 211 Employees gave a score: Always – No, never, provinces with less than ten respondents were excluded from further analysis.

Consult influences purchase	Always	Yes, frequently	Yes, sometimes	No, never
Brabant	3,7%	44,4%	46,3%	5,6%
Gelderland	0,0%	35,5%	54,8%	9,7%

Limburg	0,0%	53,8%	38,5%	7,7%
Noord-Holland	4,3%	51,1%	34,0%	10,6%
Utrecht	0,0%	57,9%	31,6%	10,5%
Zuid-Holland	2,1%	48,9%	40,4%	8,5%
Incorporate sustainability in consult	**Always**	**Yes, frequently**	**Yes, sometimes**	**No, never**
Brabant	0,0%	20,4%	57,4%	22,2%
Gelderland	0,0%	16,1%	71,0%	12,9%
Limburg	7,7%	7,7%	69,2%	15,4%
Noord-Holland	2,1%	29,8%	55,3%	12,8%
Utrecht	0,0%	10,5%	68,4%	21,1%
Zuid-Holland	2,1%	12,8%	55,3%	29,8%

For the statement, I have sufficient knowledge about sustainability to incorporate sustainability in consults, provinces do not differ from the general results regarding their distribution (Table 6). Both the median and modus is 3; Neutral. There is a difference in polarisation of the distribution between provinces for categories 2-4; Disagree-Agree. These results indicate that the general opinion is the same for all provinces, only the polarisation of the opinions differ between provinces.

Table 6: To what extent do store employees consider their sustainable knowledge to be sufficient to incorporate in consults, categorized in provinces? 211 Employees gave a score: fully agree – fully disagree, provinces with less than ten respondents were excluded from further analysis.

Sufficient knowledge about sustainability	Fully agree	Agree	Neutral	Disagree	Fully disagree
Brabant	0,0%	33,3%	48,1%	14,8%	3,7%
Gelderland	0,0%	25,8%	51,6%	19,4%	3,2%
Limburg	7,7%	30,8%	30,8%	30,8%	0,0%
Noord-Holland	2,1%	38,3%	44,7%	14,9%	0,0%
Utrecht	5,3%	15,8%	57,9%	15,8%	5,3%
Zuid-Holland	0,0%	14,9%	68,1%	14,9%	2,1%

COMPARING FUNCTIONS

The exclusion variables with a response rate lower than 10 applied for functions as well, therefore, Stock clerk was excluded from further comparisons. For the question if consults are recognized in purchases, the modus is 3; Yes, regularly for all functions except Store manager (Table 7). The modus of Store manager is 2; Yes, sometimes. The median differs per function, Sellers and Service&Sales leads have a median of 3; Yes, regularly, and entrepreneurs and Store managers have a median of 2;

Yes, sometimes. Furthermore, the polarisation of the distribution differs per function for categories 1-3; No, never-Yes, regularly. Noteworthy, the difference between entrepreneurs, store managers and sellers, Servic&Sales leads could signal for a difference in experience based on function level. Both Store manager and entrepreneur have a managerial role in the store, whereas sellers and Service&Sales leads mainly work within the store. A possible explanation for the dissimilar experience regarding consults and purchases is that sellers and Service&Sales leads have more customer interaction and consult more frequently, or compellingly. In order to evaluate this assumption additional questions could give insight if there are any differences between function in the way or frequency of consulting consumers. When looking at the question whether employees incorporate sustainability in their consults, no difference in distribution between functions or the general results can be observed. The modus and median are both 2; Yes, sometimes. The polarisation of the distribution differs per function in categories 1 and 2; No, never and Yes, sometimes respectively. Aligned with the general results, consults influence purchases more frequently than sustainability is incorporated in consults.

Table 7: How often do consult influence consumers' purchase behaviour? & How often do store employees incorporate sustainability in their consults?, categorized in functions. 238 Employees gave a score: Always – No, never, provinces with less than ten respondents were excluded from further analysis.

Consult influencing purchase	Always	Yes, frequently	Yes, sometimes	No, never
Seller	0,0%	53,7%	42,6%	3,7%
Entrepreneur	0,0%	38,9%	33,3%	27,8%
Service&Sales lead	5,9%	45,6%	35,3%	13,2%
Store manager	2,0%	40,8%	50,0%	7,1%
Incorporate sustainability in consult	**Always**	**Yes, frequently**	**Yes, sometimes**	**No, never**
Seller	1,9%	18,5%	63,0%	16,7%
Entrepreneur	0,0%	11,1%	61,1%	27,8%
Service&Sales lead	2,9%	20,6%	50,0%	26,5%
Store manager	0,0%	16,3%	67,3%	16,3%

The statement I have sufficient knowledge about sustainability to incorporate sustainability in consults has a median and mode of 3; Neutral for all functions, similar to the general results (Table 8). No differences are found in polarisation of the distribution between functions. This indicates that all functions have the same general opinion, and the polarisation of the distribution is the same as well. Function does not influence employee's perception on their obtained sustainability knowledge in relation to consulting.

Table 8: To what extent do store employees consider their sustainable knowledge to be sufficient to incorporate in consults, categorized in provinces? 238 Employees gave a score: fully agree – fully disagree, provinces with less than ten respondents were excluded from further analysis.

Sufficient knowledge about sustainability	Fully agree	Agree	Neutral	Disagree	Fully disagree
Seller	0,0%	27,8%	57,4%	13,0%	1,9%
Entrepreneur	5,6%	27,8%	50,0%	16,7%	0,0%
Service&Sales lead	1,5%	29,4%	45,6%	20,6%	2,9%
Store manager	1,0%	24,5%	54,1%	18,4%	2,0%

COMPARING ORGANISATION STRUCTURE

There is no difference between franchise, company owned and general results regarding recognising consults in consumers' purchases (Table 9). The median is 2; Yes, sometimes and the modus 3; Yes, regularly. The difference in polarisation of the distribution is also below the 10% threshold. Therefore, results indicate no difference between franchise and company owned in the polarisation of the distribution. In line with the general results, the median and modus of employees incorporating sustainability in their consults is 2; Yes, sometimes. Again, there is no difference in polarisation of the distribution between franchise and company owned. These results identically align with the general results indicating a higher frequency of consults influencing purchases than sustainability being incorporated in consults.

Table 9: How often do consult influence consumers' purchase behaviour? & How often do store employees incorporate sustainability in their consults?, categorized in organization structure. 240 Employees gave a score: Always – No, never.

Recognize consult in purchase	Always	Yes, frequently	Yes, sometimes	No, never
Franchise	1,5%	45,5%	42,4%	10,6%
Company owned	2,9%	44,3%	43,7%	9,2%
Incorporate sustainability in consult	**Always**	**Yes, frequently**	**Yes, sometimes**	**No, never**
Franchise	1,5%	18,2%	63,6%	16,7%
Company owned	1,1%	17,2%	59,2%	22,4%

For the statement, I have sufficient knowledge about sustainability to incorporate sustainability in consults, both modus and median are 3; Neutral for both franchise and company owned (Table 10). This is similar to the general results. The polarisation of the distribution is different for scoring categories 3 and 4; Neutral and Agree respectively. Notable, the polarisation of company owned strongly favours 3; Neutral and franchise has a weaker polarisation favouring 3; Neutral.

Table 10: To what extent do store employees consider their sustainable knowledge to be sufficient to incorporate in consults, categorized in organization structure? 240 Employees gave a score: fully agree – fully disagree.

Sufficient knowledge about sustainability	Fully agree	Agree	Neutral	Disagree	Fully disagree
Franchise	3,0%	36,4%	39,4%	21,2%	0,0%
Company owned	0,6%	23,6%	56,9%	16,1%	2,9%

OPEN QUESTIONS

The survey also included some open questions to gain insights into employees' opinions about sustainability within Etos, these questions were not mandatory. For the question 'What additional questions/remarks about sustainable topics do consumers ask?' 60 out of 240 respondents gave an answer. 19 of these 60 responses concerned the current plastic bags. Etos still selling plastic bags, whereas most other stores switched to paper bags. After meeting with Sophie from Marketing communication it became clear that the paper bags were considered more environmentally friendly by the public, but this is not necessarily the case. Plastic bags can be reused, whereas paper bags are often discarded after one-time usage. This thus results in more waste and is therefore not very sustainable. The disconnect between employees' perception and headquarters considerations further illustrates the need to educate consumers and employees about the reasoning behind (sustainable) initiatives.

8 Responses included Etos policies, specifically the open doors during the winter. This was already included in the previous multiple-choice questions, but apparently employees felt strongly about this topic to answer this to the question. This winter, instead of open doors being the norm, companies closed their doors to conserve energy. Companies chose to revise their original door policy this winter because of the high gas prices, with the side effect of being more sustainable. Either Etos did not change their door policy, or some stores were unable to comply to this change of policy because of practical reasons. One respondent even mentioned aggressive comments from consumers about the open doors. This indicates that consumers had a clear opinion about the door policy, and they have an opinion about Etos regarding sustainability.

Other responses concerned the increased demand for natural ingredients, sustainable resources, packaging, microplastics, assortment additions and sustainable initiatives. Since the first three topics are already discusses extensively in the other questions of the survey, this paragraph highlights the assortment additions and sustainable initiatives. There is increasing demand for sustainable products, such as shampoo bars and biological products. Few responses also included the demand for more eco brands. Apparently, some consumers are considerably invested in sustainability to propose sustainable initiatives like a digital receipt, refill stations, and the inclusion of refill products in promotions. Both the assortment additions and sustainable initiatives could be considered for action within Etos.

Regarding the question 'What are your ideas how Etos could communicate about sustainability in-store?' 108 employees filled in a response. 45 employee's responses considered in-store communication like displays, shelf cards, green banners and creating a sustainable category.

Employees believe sustainable communication could be accomplished with additional tags to increase awareness for consumers. Besides the colour green, the creation of a sustainability logo could draw attention to sustainability products as well. Some responses also included a warning that consumers do not read the displays actively and too many shelf cards will come across as cluttered. 23 Out of 108 responses concerned increasing awareness via communication channels like social media and the flyer. In-store communication can draw attention of current shoppers, whereas communication channels like social media and flyers grasp attention of possible future shoppers. Alongside communicating about the presence of sustainable products, promotions could also incline consumers to purchase sustainable products. Including sustainable products in promotions and a week dedicated to sustainability were also opted as ideas for sustainable communication by employees. The last interesting topic could be summarized as education. Some responses included tips and tricks how consumers could live more sustainably and starting a dialogue between consumers and employees about sustainability.

The last open question asked whether employees had additional comments, 55 employees took this opportunity to voice their opinion. 13 of them included a comment about education, they want to learn more about sustainable product features and include this information in their consults. 10 of the responses applauded the initiative of Etos to draw attention to sustainability and highlighted the relevance of this topic. The majority of the remaining responses focus on displays and product packaging. Employees explain that Etos delivers brand specific displays for every promotion, which results in a lot of waste. Instead, employees propose the reuse of brand specific displays, especially brands that have frequent promotions like OralB. Employees also state that products could do with less packaging, to decrease waste.

COMMUNICATION MODEL

Companies do communicate about sustainability; however, the amount and quality of this communication differs per company. This communication model quantitatively measures the performance of sustainable communication on the website. The raw data can be disclosed upon request. In order to give more context to the quality and unique initiatives or features mentioned on company's websites, I added a description of the sustainable communication per company.

Reviewing the total scores of the drugstore companies indicate that the Dutch drugstore industry does not perform well on sustainable communication, according to this model. The score ranges described in the method section provide context to the scores attributed to drugstores. Four out of 6 Dutch drugstores do not represent acceptable compliance with the sustainability criteria, score range of 60-69% (Table 11). Kruidvat has an excellent compliance and Trekpleister a satisfactory compliance. Boots, the UK drugstore and inspiration for Etos, also showed excellent compliance with the sustainability criteria. Of note these three companies with good compliance have a sustainability report, whereas the other companies do not. The largest difference between these companies is in the content pillar, many of the criteria companies with weak of poor compliance failed to meet were mentioned in the sustainability report of Kruidvat, Trekpleister and Boots. This model thus indicates the importance of a sustainability report to comply with the sustainability criteria. Due to the inability to incorporate quality of information and communication in this model, the results should only be considered illustrative and not absolute.

Table 11: Scores of the communication model per company. Both the total score and subtotal scores per dimension are presented. A total of 42 points could be obtained. The total scores in percentages can be categorized in the ranking categories explained in the method section.

Communication model scores	Orientation	Structure	Ergonomics	Content	Total score	Total score in %
Etos	2	1	9	12	24	**57,1%**
Kruidvat	3	1	11	20	35	**83,3%**
Holland&Barrett	1	0	8	6	15	**35,7%**
Trekpleister	2	1	9	16	28	**66,7%**
Da	0	0	8	5	13	**31,0%**
Deonlinedrogist.nl	0	0	8	6	14	**33,3%**
Boots	2	1	10	21	34	**81,0%**
Total points possible	3	2	12	25	42	100%

Considering that Etos has not published a sustainability report, just like Holland&Barrett, Da and Deonlinedrogist.nl, Etos sustainability communication is considerably 'better' compared with these other drugstores. The informative web section about the sustainable certificates helps educate consumers and this is unique to Etos. In order to further improve sustainable communication steps could be made. The sustainability label of Deonlinedrogist draws attention to sustainable products and could be implemented at Etos as well. The recycling initiative, combined with discounts at Boots could also activate consumers to make another trip to the Etos store. Etos already checked the boxes of these criteria, and implementation will therefore not improve the compliance to this model, but it could improve the quality of the sustainable communication. Furthermore, this model contained five criteria that were not present in any of the reviewed companies: multilingual functionality, consumer participation, sustainability newsletter, surveys, and online communities. These criteria primarily focus on consumer inclusivity and starting a dialogue. The absence of these criteria in other drugstores could be viewed as something that is not profitable since others do not have it either. On the other hand, it could also be viewed as an opportunity to differentiate Etos from the competition. For instance, a community where consumers can share their sustainability tips with each other. Each sustainability initiative should be carefully analysed, and the gains should be weight against the losses.

ETOS

Etos communicates little about environmental sustainability. The initiatives mentioned on in the sustainability section are not bold statements and lack goals. Sustainability is not included in Etos' core values and is mentioned in a separate link on the webpage. The core value of Etos focusses more on the societal relevance rather than environmental. The main environmental challenges they mention are pollution and illegal sourcing of resources like palm oil. Overall, the website ticks many boxes the criteria from structure and ergonomics. Etos interacts with their consumers via press releases and consumers are able to communicate to Etos via the service desk. There is no tool available that enables consumers to talk to each other. Regarding the structure pillar, Etos scores 1 out of 2, because of the absence of multilingual functionality. Although ergonomics pillar has a good score of 9/12, the multimedia subdimension has a score of 1/3, indicating room for improvement. The last and biggest pillar is content, here Etos scores 12/25, which indicates the need for change regarding informational sustainability communication towards consumers. Etos does not yet report on their sustainability performance and does not mention sustainability initiatives in the supply chain or regarding stakeholder engagement. The only current commitment is the palm oil and paper certification. The Etos Pure line is committed to introduce a 100% vegan cosmetics line and it will contain 90% natural ingredients. Etos does score 2/3 on the subdimension raise awareness and activate consumers. They use labels like sustainable, vegan, and biological and have a filter option for natural, sustainable, recyclable and biological products. Furthermore, Etos has an informative link explaining the meaning of certifications like FSC, RSPO, PETA etc. There is no explanation available for the labels and filter options, for instance for the meaning of sustainability. Overall, Etos scores 24 out of 42, equalling 57,1%. This categorizes Etos as a company with weak compliance with sustainable communication criteria, actions for improvement are required in different dimensions to prevent reputational risks.

KRUIDVAT

Kruidvat included sustainability in their about us section, stating doing good feels good. The statements are vague and open to interpretation as they mention having a sustainable assortment, without explaining sustainable. The main sustainability challenge mentioned is air pollution, waste, and illegal sourcing. This totals to a score of 3/3 on the pilar orientation. Like Etos, Kruidvat scores 1/2 on Structure due to the lack of multilingual functionality. Kruidvat scores good on the pilar ergonomics as well, 11/12. They have sustainable choice and a natural&beneficial category. The latter is a logo invented by Kruidvat and will be attributed to a product when it checks a minimum of 6 out of 11 sustainability criteria. Which criteria the product complies with are not mentioned in the product description. The specifications for the sustainable choice category are not explained either. Even though the quality of sustainability categories is to be determined due to the lack of information provided, it checks the box of the criteria presence of categories. This further illustrates the weakness of this model and the reason these results should be considered illustrative rather than scientific facts.

The content pillar is well represented within Kruidvat with a score of 20/25. They published a sustainability report from their organisation A.S. Watson. This report contains progress reports on sustainability objectives and explains Kruidvat's sustainability initiatives. Kruidvat also won first place as transparent retailer. This indicates both honesty and clarity of the sustainable information provided. Furthermore, the blog provides opportunity to address sustainability topics and provide tips for at home. In total, Kruidvat scores 35/42 equalling 83.3%. This score qualifies Kruidvat as a company showing excellent compliance with the sustainability criteria.

HOLLAND&BARRETT

Interestingly, despite their sustainable perception, Holland&Barrett does not communicate about their sustainable initiatives, other than "De Tuinen” products, on their website. The about us page mentions their leading role in natural products, and they have the ambition the make it easier for consumers to make healthy and sustainable choices. By the looks of it, all Holland&Barrett does is provide a sustainable assortment, rather than operating in a sustainable manner too. Because of the absence of the sustainability web section Holland&Barrett scores 1/3 on orientation and 0/2 on structure. Compared to the other pillars, they score relatively good on ergonomics with a score of 8/12. Especially the product filters and categories are noteworthy. They have a category named natural care, with subcategories of vegan beauty and zero waste. Furthermore, they have eight product filters related to sustainability. The unique filters are carbon neutral, zero waste and locally produced. The definition and relevance of these filters are further explained for the filter zero waste but not for carbon neutral and locally produced. Based on the pillar content; they score 6/25. Their blog and product descriptions ensure a 3/3 score on the subdimension raising awareness. They do not only educate their consumers on some terms regarding sustainability but also include tips for consumers at home. Overall, Holland&Barrett scores 15/42 points, matching 35.7%. This is coherent with poor compliance with the sustainable communication criteria, it is crucial that the strategy and practises regarding digital sustainable communication need to be revised.

TREKPLEISTER

Trekpleister and Kruidvat are both part of the A.S. Watson group and share a sustainability report. Therefore, Trekpleister's scoring chart is similar to Kruidvat. They score 2/3 on orientation because environmental sustainability is not mentioned in the about as page directly but is included in a separate sustainability web section. They score 1/2 on structure and 9/12 on ergonomics. The difference with Kruidvat is the absence of a sustainability commercial and sustainable product categories or filters. Trekpleister scores 16/25 on content, which is four points less than Kruidvat because 0/3 score on the subdimension raising awareness and the absence of sustainability references on the homepage. Trekpleister does not have a blog or web section explaining sustainability terms. The total score of Trekpleister is 28/42, which is 66.7% This represents acceptable compliance, with the possibility for actions to improve different dimensions.

DA

Da does not report on their sustainability initiatives, if they have any. They only educate consumers about sustainability term and provide them with tips to be more sustainable at home via their blog. Unique to Da is the magazine feature. This magazine is uploaded seasonally and includes a large variety of information related to drugstore products and purposes. Some of these topics also contain a sustainability section where Da shares sustainability tips for consumers. Da scores 0/3 and 0/2 on orientation and structure, respectively. The ergonomics’ score is 8/12. Worth mentioning is the use of product filters. Da sporadically includes sustainable product filters as an option for search criteria. This inconsistency can also be recognized in the product description. Some products do have a product description and others do not. Products with sustainability claims that do include a product description mention the sustainable features of the product. The content pillar scores 5/25 because of the absence of a sustainability report and sustainability web section. Overall, Da scores 13 out of 42 points, which is 31.0%. Da thus has a poor compliance with the sustainable communication criteria and should revise their strategy and practises regarding sustainable communication on their website.

DEONLINEDROGIST.NL

This digital druggist company does not have a sustainability web section where all initiatives are clustered but does have a blog that includes sustainability tips and aids consumers in the choice for sustainable products. Furthermore, deonlinedrogist.nl briefly described their sustainable initiatives in the internal operations in their blog. Their sole initiative is an efficient packaging machine to cut back on packaging materials and this efficient packaging allows maximal capacity during transportation. Since the items for the blog are substantially fragmented, it was not considered to be a sustainability web section, therefore, deonlinedrogist.nl gets 0 points for both orientation and structure. They score 8/12 points on ergonomics and have sustainable categories like vegan. Despite the lack of reporting on their internal operations and supply chain, deonlinedrogist.nl does have a unique and appealing sustainability feature on their website. They operate with a green choice label. A product can obtain this label when it checks on of 5 criteria: 95% natural ingredients, vegetarian or vegan, biological, no chemicals, recyclable or sustainable packaging. However, chemical is a synonym for non-natural ingredient, thus the quality of these criteria is up for debate. When the green choice label is attributed to a product, information what criteria were met cannot be retrieved. Deonlinedrogist.nl scores 6/25 points, which totals to 14/42 points. This is 33.3%, equalling poor compliance with the sustainability criteria and the need for strategy revising.

BOOTS

Boots reports on sustainability most, relative to the competition described in this thesis. Sustainability is not incorporated in the values of the company description, but the sustainability web section is quite extensive. Boots scores 2/3 on orientation, 1/2 on structure and 10/12 on ergonomics. The website is well structured and easy to navigate. In order to simplify the search for sustainable products, they launched Be More; a campaign promoting the category sustainability at Boots. Here products are categorized on four sustainable features: plastic-free, reuse ready, recycled, and vegan hub. The word sustainable is used minimally as an attribute of a product, instead they specify the feature that makes the product sustainable. Concerning their ESG report, they report on their operations with SMART objectives and intermediate progress results. The statements and percentages are backed by data and Boots even provide resources used to re-enforce the data. Furthermore, they initiated an e-mail address specifically for sustainability questions.

A unique initiative worth mentioning is ‘recycle at Boots’, where the consumer can hand in their empty products, which cannot be recycled at home. There is also a discount incentive in place and a tracking system to activate consumers to participate in this sustainable initiative. Based on content Boots scores 21/25 and this totals to a score of 34/42. This score of 81.0% shows excellent compliance with the sustainability criteria.

CONCLUSION

Sustainability has become a central topic in our everyday lives and consumers require companies to take responsibility for their actions. Etos already has several sustainable initiatives in place, but the consumers' perception of Etos regarding sustainability has taken a fall in 2023. They do not communicate about their initiatives, which could explain the fall in sustainable brand perception. Since Etos does not have the lowest price perception, sustainability could be a differential opportunity for Etos. In order to differentiate on sustainability, the communication needs to be improved. This communication should be targeted at consumers and store employees and aims to inform, educate, and activate these stakeholders. Practical suggestions on how this can be accomplished will be provided in the recommendations. The aim of the recommendations is to boost the sustainable brand perception via improved sustainable communication.

The communication in-store, in the flyer and on social media also indicated Etos' weak performance on sustainable communication. None of the competitors scored above 4 out of 9 points, indicating that these nudges are not generally utilized for sustainability. All competitors used the tags and labels to draw attention to sustainability, while Etos did not have such increased salience nudges. Etos did not use any nudges in-store or in the flyer. They did utilize two nudges on social media, which was more than the overall competition. Overall, Etos underperformed on the sustainability nudges compared to its competition.

The communication model indicated that Etos has weak compliance to the sustainability criteria, mainly due to the limited sustainable content provided on the website. This could be improved by reporting on their sustainable initiatives more. This is also something that will be mandatory in 2024 because of the Green deal. The scores of the competition varied from excellent compliance to poor compliance. The presence of a sustainability report with decent content already ensures a better compliance with the sustainability criteria of this model. Considering the absence of the sustainability report, Etos obtained an overall good score compared to the other competitors without a sustainability report.

Latest trends show that sustainability has become considerably more important for consumers. They believe action should be taken now and some reports indicate consumers' willingness to pay a premium price for sustainable products. There are several types of consumers when it comes to sustainability. Overall, the portion of denialists stayed the same while the portion of activists rose considerably since last year. Other studies suggest that consumers are increasingly concerned about the environment but fail to take additional action. This could be explained by the various barriers that negatively affect the intention to take action and therefore inhibit the actual action. The survey indicated that consumers do think sustainability is important in their purchase, but it is not determinative. Natural ingredients is the most important topic they ask questions about, although employees only get questions about sustainability once a month to once a week. Furthermore, the consults have considerable impact on consumers purchasing behaviour, but oftentimes do not have sustainability incorporated in them. Etos thus does not influence consumers to choose the sustainable alternative in their consults.

The knowledge about sustainability of store employees could improve as well. Only 28% of the employees had a positive attitude towards their sustainable knowledge and ability to incorporate it in consults. This could explain why sustainability is not frequently incorporated in their consults as well. This perception on their own sustainability knowledge is not dependent on function. Luckily, store employees are keen to learn more about sustainability topics. Natural ingredients was most popular but even the least popular topic, Etos' sustainability policies, received a 68% positive score.

RECOMMENDATIONS

Based on the insights provided in this thesis five recommendations will be discussed below. The type of consumer Etos wants to target for the sustainable communication should be established first. After this is established, the other four recommendations could be implemented, whilst holding the attitudes of the target consumers in regards. The priority for the remaining four recommendations is mostly the same. The only point of attention is the mandatory reporting on sustainable initiatives by 2024. The speed and ambitions of sustainable communication is dependent on the level to which Etos wants to be perceived as sustainable. These recommendations assume Etos will change their way of working and incorporate sustainability in their identity.

TYPE OF CONSUMER

There are various types of consumers when it comes to sustainability. It is impossible to focus the communication on all of them, therefore I recommend targeting two types: the pragmatists and busy bystanders. Currently, activists are probably not the main consumers of Etos. The survey illustrated that sustainability is not determinative in consumers purchases, which is inconsistent with activists. However, the activist group is growing due to less conscious consumers becoming more sustainable. Therefore, in order to retain customers in the future, Etos should revise their communication towards becoming more and more sustainable in the future. So, when the sustainability image of Etos is restored, communication could be shifted towards the growing group of activists. The conflicted contributors are price sensitive and view sustainability as expensive. Furthermore, since price is their main objective in their shopping behaviour, they probably are more likely to go to Kruidvat that has the lowest price perception. If Etos restores their low-price perception, it would be possible to target this group as well in the future. Then the communication should focus on sustainability being a co-benefit. The disengaged denialists are not engaged with sustainability and are therefore not a good fit for Etos when they want to integrate sustainability way of working.

Therefore, I suggest the current communication should focus on pragmatists and busy bystanders. Both groups are wealthy and could be the current consumers of Etos. Pragmatists are already making more sustainable choices but often lack knowledge to increase their impact. Most sustainable changes are small and affect their everyday lives. They also want companies to communicate about their sustainable initiatives and are willing to be educated when trusted brands bring the information. The busy bystanders are relatively young people with fast moving lives. They say that they are not that concerned with the environment and therefore do not act sustainably. Additional education is required to make them aware of the urgency of sustainable actions. When they are convinced of the importance, they will require convenience when choosing sustainable products, in order to fit their busy lifestyle. The most important focus for sustainable communication would be focussed on educating on sustainability and increasing convenience.

IN-STORE SUSTAINABILITY COMMUNICATION

Considering the lack of attention regarding sustainable communication in-store at Etos, a lot can be improved. In order to level with competing drugstores, the increased salience nudge of tags and labels should be implemented. Employees proposed the use of shelf cards which can be categorised as an increased salience nudge. A fair warning employees drew attention to, is consumers disinterest to read shelf cards, therefore increased salience via tags and labels will not be sufficient to spike consumers' interest. A combination of nudges might be most effective. The use of the simplicity nudge might protect the image of Etos from becoming cluttered. A lot of shelf cards might slightly increase consumers attention for sustainable products, but it could also result in a messy appearance. Etos is known for quality and calmness and these trades should not be lost because of sustainable communication. The simplicity nudge of categorisation, also suggested by employees, could decrease the number of shelf cards needed to inform consumers about sustainable product features. This could preserve the quality and calmness trades of Etos' brand perception. Another increased salience nudge is the use of colour, like a green banner being associated with sustainability. Nowadays Etos associates the colour green with medicine. If green banners are to be associated with sustainable products, the colour association with Medicine within Etos needs to change. These nudges subconsciously influence consumers shopping behaviour and increase the convenience of shopping sustainable products, which was a barrier for the busy bystander.

FLYER AND SOCIAL MEDIA SUSTAINABILITY COMMUNICATION

In-store communication is effective to create awareness for the current shoppers, however, consumers need to be aware of sustainable product options prior to entering the store as well. Both the flyer and social media can inform consumers about the current sustainable assortment of Etos. Overall, the flyer of drugstores does not pay a lot of attention to sustainability. The open questions of the survey had various comments focused on communicating about sustainability in the flyer, store employees think this is a good medium for such communication. There are various nudges available for the sustainable communication. The increased salience nudge could highlight sustainable products with labels and colour, and the simplicity nudge could categorize sustainable products in a separate section of the flyer. This creates awareness and tackles the 'lack of availability' barrier that affects the say-do gap. Etos does score good on sustainable communication on social media. They way sustainable products are communication is thus good, the frequency of such communication could increase if Etos desires to highlight sustainable products more in the future.

Both the flyer and social media can also be used to educate and activate consumers. It is now primarily used to inform the consumer about the current assortment. However, it could also be used to educate consumers about the environmental effects of a certain product group, like refills or shampoo bars.

CORPORATE WEBSITE

The communication model was only a tool to illustrate the presence of certain sustainability criteria on the corporate website and did not review the quality of the content. It became apparent that the presence of a sustainability reports influences the score of the communication model significantly. Etos should publish such a report or related content in a more casual manner, since it also becomes mandatory in 2024. The corporate sustainability reporting directive has set rules in place to ensure transparency and avoid greenwashing (European Commission, n.d.-b). As of now, Etos does not communicate about their ambitions, initiatives, and progress. Including this on their website could affect Etos sustainable brand perception positively. It should be noted that the corporate website requires an active attitude from the stakeholders to find the information. Most consumers rather obtain such sustainability claims in a more passive manner (Doshi & Noble. Steve, 2023). Publishing sustainability claims on the corporate website alone will not be enough to increase the sustainable brand perception, it requires additional media to convey the message.

There are several features available on websites relating to sustainability. Most drugstore companies have sustainability filters and/or categories in place. However, the filter is than titled 'sustainable', which holds no meaning without context. Deonlinedrogist developed a sustainability label and explained what criteria should be met in order for a product to obtain such a sustainability label. This provides some context but still does not fully disclose which criteria a product complies with. Albert Heijn is trying to implement a decision tree regarding sustainable features of non-food, Etos could piggyback on this initiative to gain insights into products sustainability features in order to give more detailed filter options. This decision tree could also be the foundation am Etos specific sustainability label that can be implemented on the website.

EDUCATION FOR EMPLOYEES AND CONSUMERS

This thesis mentioned various reports regarding barriers affecting the say-do gap. The barrier of lack of knowledge and awareness, and consumers mistrusting sustainability claims can be traced back to the way companies communicate. In general, claims companies make hold little meaning to uneducated consumers. This is a problem for both the busy bystanders and the pragmatists. Etos could help educate these consumers by sharing the context behind sustainability claims. As mentioned before, the term sustainable is too broad to fully grasp the meaning without additional information. Based on the topics consumers ask questions about, Etos should elaborate on natural ingredients and microplastics first. These topics were most popular and should therefore be highlighted in the sustainable communication plan. It is important to add a disclaimer when Etos communicates about natural ingredients, because they are not per definition more sustainable (de Vries, 2018). Employees ask the least questions about Etos' sustainability policies, however employees also indicated that some of Etos' sustainability policies cause great frustration amongst consumers. Employees recommendations for more sustainable initiatives included the ban on plastic bags, closed door policy and reduction of display materials. On the one hand, consumers are not interested in Etos' policies, but lack of initiatives do cause frustration. If Etos were to publish a sustainability report, sustainable policy information should be included on the website, but the frustration is most likely primarily directed towards store employees. Therefore, employees should also be educated on sustainability, like the reasoning behind (lack of) sustainability initiatives.

Store employees are an important point of contact for consumers. Consumers ask them questions and in return get a consult on products. Consults influence consumers purchases considerably and this could be used to Etos' advantage when it comes to activating consumers to buy more sustainable products. As of now, sustainability is sometimes included in the consults, but more often not. In order for store employees to include sustainability in their consults, they need sufficient knowledge about sustainability. Etos could facilitate this knowledge. Since store employees are more than willing to learn more about sustainability, Etos could provide them with webinars and/or online modules. All sustainability topics received a cheerful outlook when it comes to learning, however natural ingredients was most popular. This is consistent with the popular topics consumers ask questions about. These educational tools could facilitate additional knowledge for all store employees, with the urgent message to include this information in future consults. Hopefully, this will ensure sustainability is incorporated in consults for all functions. The level of perceived level of sustainability knowledge is the same throughout the country and does not differ per function or organisational structure. However, before additional information will be shared, the basic level of understanding and knowledge should be tested to ensure the information is accessible for everyone.

It is difficult to measure if these consults with sustainability incorporated in them results in more sustainable product sales. However, an indicator for the effectiveness of improved sustainable communication across all dimensions could be the percentage of sustainable product sales out of the total product sales. This active form of spreading sustainable communication via consults could also affect Etos' sustainable brand perception and aids in Etos differentiating towards sustainability.

Summation of recommendations:

- Focus consumer communication on pragmatists and busy bystanders.
- In-store nudge categorisation first, with additional colour and tags/labels where necessary.
- Flyer communication should include sustainability, either with nudges or with educational texts. Social media is already good, but frequency of the sustainable communication could be increased.
- Website should include a sustainable report but should not be the sole communication tool. The Albert Heijn decision tree could lay groundwork for more context for sustainable filters and categories, perhaps even a sustainability label.
- Consumers need more knowledge about sustainability. Etos could provide this, starting with natural ingredients and microplastics. Employees also need additional sustainability knowledge to incorporate it in their consults.

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APPENDIX 1

A: SURVEY QUESTIONS

1. What is your function within Etos?
    a. Entrepreneur
    b. Store manager
    c. Service&Sales lead
    d. Seller
    e. Stock clerk
2. In which province is the store located?
    a. Brabant
    b. Drenthe
    c. Flevoland
    d. Friesland
    e. Gelderland
    f. Groningen
    g. Limburg
    h. Noord-Holland
    i. Overijssel
    j. Utrecht
    k. Zeeland
    l. Zuid-Holland
3. What is your store number? (Open answer: number between 6000 and 9000.)
4. How many hours do you work per week?
    a. 12 hours or less
    b. Between 13 and 24 hours
    c. Between 24 and 32 hours
    d. More than 32 hours
5. How often do consumers ask questions about the following sustainability topics? (This question made use of the linkert scale where every topic should be scored (Never, Rarely, Sometimes, Often, Always))

- **Etos' sustainability policies** (For instance, the closed-door policy to preserve energy, electrical transport from distribution centres to stores, packaging materials for cargo.)

- **Sustainable packaging** (For instance, product packaging from recycled plastic, alternative materials, recyclable packaging.)
- **Natural ingredients** (Ingredients are sourced in nature and not lab-made, like aloe vera, Argan oil and lavender.)
- **Sustainable resources** (Quality labels are often displayed on the products packaging to indicate sustainable sourcing. For instance, Rainforest Alliance protects the rainforest and ensures sustainable coffee sourcing and RSPO ensures sustainably sourced palm oil.)
- **Microplastics** (small plastic particles that are harmful to the environment but are still utilized in for instance scrubs, wipes and medicine.)

6. What additional questions/remarks about sustainable topics do consumers ask? (Open answer)
7. How often do consumers ask you about sustainability?
    a. Less than 1x per month
    b. About 1x per month
    c. About 1x per week
    d. About 1x per day
    e. Multiple times per day
8. What are your ideas how Etos could communicate about sustainability in-store? (Open answer)
9. When you consult consumers, do you incorporate sustainability in the consults?
    a. No, never
    b. Yes, sometimes
    c. Yes, regularly
    d. Always
10. When you consult consumers, do recognise the consult in the purchases?
    a. No, never
    b. Yes, sometimes
    c. Yes, regularly
    d. Always
11. I have sufficient knowledge about sustainability to incorporate sustainability in consults.
    a. Fully disagree
    b. Disagree
    c. Neutral
    d. Agree
    e. Fully agree
12. Do consumers think sustainability is important for their purchase? (scale 1-5: 1=Not at all important, 5=Absolutely important)
13. Do consumers think sustainability is determinative for their purchase? (scale 1-5: 1=Not at all determinative, 5=Absolutely determinative)
14. I want to learn more about these sustainable topics: Etos' sustainability policies, Sustainable packaging, Natural ingredients, Sustainable resources and Microplastics. (This question made use of the linkert scale where every topic should be scored (Fully disagree, Neutral, Agree and Fully agree))
15. Do you have any questions or additional remarks?

B. SURVEY DATA REGION, FUNCTION AND ORGANISATION STRUCTURE

Table 1: 240 store employees responded to the survey and are categorized in provinces, function and organization structure. Province consists of twelve provinces, function can be categorized into five categories and organization structure into two categories. The amount of respondents that can be attributed to a province, function or organization structure is listed right next to the category.

Province	Responses	Function	Responses	Organisation structure	Responses
Brabant	54	Seller	54	Franchise	66
Drenthe	3	Entrepreneur	18	Company owned	174
Flevoland	5	Service&Sales lead	68		
Friesland	4	Stock clerk	2		
Gelderland	31	Storemanager	98		
Groningen	6				
Limburg	13				
Noord-Holland	47				
Overijssel	7				
Utrecht	19				
Zeeland	4				
Zuid-Holland	47				

C. STATISTICAL ANALYSIS CHI-SQUARE GOODNESS OF FIT TEST

DO CONSUMERS THINK SUSTAINABILITY IS IMPORTANT FOR THEIR PURCHASE?

Statistics

ImportantRating

N	Valid	240
	Missing	0
Median		3.0000
Mode		3.00

ImportantRating

	Observed N	Expected N	Residual
1.00	11	48.0	-37.0
2.00	45	48.0	-3.0
3.00	134	48.0	86.0
4.00	44	48.0	-4.0
5.00	6	48.0	-42.0
Total	240		

Test Statistics

	ImportantRating
Chi-Square	219.875[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 1: Statistical values to determine the importance of sustainability in the purchase. 240 respondents and the p is set at 0.05.

DO CONSUMERS THINK SUSTAINABILITY IS DETERMINATIVE FOR THEIR PURCHASE?

Statistics

DeterminRating

N	Valid	240
	Missing	0
Median		3.0000
Mode		3.00

DeterminRating

	Observed N	Expected N	Residual
1.00	15	48.0	-33.0
2.00	64	48.0	16.0
3.00	134	48.0	86.0
4.00	24	48.0	-24.0
5.00	3	48.0	-45.0
Total	240		

Test Statistics

	DeterminRating
Chi-Square	236.292[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 2: Statistical values to determine the determinativeness of sustainability in the purchase. 240 respondents and the p is set at 0.05.

HOW OFTEN DO CONSUMERS ASK YOU ABOUT SUSTAINABILITY?

Statistics

QuestionRating

N	Valid	240
	Missing	0
Median		2.0000
Mode		3.00

QuestionRating

	Observed N	Expected N	Residual
1.00	64	48.0	16.0
2.00	59	48.0	11.0
3.00	76	48.0	28.0
4.00	32	48.0	-16.0
5.00	9	48.0	-39.0
Total	240		

Test Statistics

	QuestionRating
Chi-Square	61.208[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 3: Statistical values to determine the frequency consumers ask store employees questions about sustainability. 240 respondents and the p is set at 0.05.

HOW OFTEN DO CONSUMERS ASK QUESTIONS ABOUT THE FOLLOWING SUSTAINABILITY TOPICS?

Statistics

PoliciesRating

N	Valid	240
	Missing	0
Median		2.00
Mode		1

PoliciesRating

	Observed N	Expected N	Residual
1	74	48.0	26.0
2	52	48.0	4.0
3	69	48.0	21.0
4	30	48.0	-18.0
5	15	48.0	-33.0
Total	240		

Test Statistics

	PoliciesRating
Chi-Square	53.042[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 4: Statistical values to determine the frequency consumers ask store employees questions about Etos' sustainability policies. 240 respondents and the p is set at 0.05.

Statistics

PackagingRating

N	Valid	240
	Missing	0
Median		3.0000
Mode		3.00

PackagingRating

	Observed N	Expected N	Residual
1.00	25	48.0	-23.0
2.00	66	48.0	18.0
3.00	95	48.0	47.0
4.00	39	48.0	-9.0
5.00	15	48.0	-33.0
Total	240		

Test Statistics

	PackagingRating
Chi-Square	88.167[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 5: Statistical values to determine the frequency consumers ask store employees questions about sustainable packaging. 240 respondents and the p is set at 0.05.

Statistics

IngredientRating

N	Valid	240
	Missing	0
Median		4.0000
Mode		4.00

IngredientRating

	Observed N	Expected N	Residual
1.00	5	48.0	-43.0
2.00	7	48.0	-41.0
3.00	74	48.0	26.0
4.00	134	48.0	86.0
5.00	20	48.0	-28.0
Total	240		

Test Statistics

	IngredientRating
Chi-Square	258.042[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 6: Statistical values to determine the frequency consumers ask store employees questions about natural ingredients. 240 respondents and the p is set at 0.05.

Statistics

ResourceRating

N	Valid	240
	Missing	0
Median		3.0000
Mode		3.00

ResourceRating

	Observed N	Expected N	Residual
1.00	28	48.0	-20.0
2.00	59	48.0	11.0
3.00	92	48.0	44.0
4.00	46	48.0	-2.0
5.00	15	48.0	-33.0
Total	240		

Test Statistics

	ResourceRating
Chi-Square	73.958[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 7: Statistical values to determine the frequency consumers ask store employees questions about sustainable resources. 240 respondents and the p is set at 0.05.

Statistics

MPlasticRating

N	Valid	240
	Missing	0
Median		3.0000
Mode		3.00

MPlasticRating

	Observed N	Expected N	Residual
1.00	21	48.0	-27.0
2.00	32	48.0	-16.0
3.00	100	48.0	52.0
4.00	70	48.0	22.0
5.00	17	48.0	-31.0
Total	240		

Test Statistics

	MPlasticRating
Chi-Square	106.958[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 8: Statistical values to determine the frequency consumers ask store employees questions about microplastics. 240 respondents and the p is set at 0.05.

WHEN YOU CONSULT CONSUMERS, DO RECOGNISE THE CONSULT IN THE PURCHASES?

Statistics

PurchaseRating

N	Valid	240
	Missing	0
Median		2.0000
Mode		3.00

PurchaseRating

	Observed N	Expected N	Residual
1.00	23	60.0	-37.0
2.00	104	60.0	44.0
3.00	107	60.0	47.0
4.00	6	60.0	-54.0
Total	240		

Test Statistics

	PurchaseRating
Chi-Square	140.500[a]
df	3
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 60.0.

Figure 9: Statistical values to determine if consults are incorporated in consumers purchases. 240 respondents and the p is set at 0.05.

WHEN YOU CONSULT CONSUMERS, DO YOU INCORPORATE SUSTAINABILITY IN THE CONSULTS?

Statistics

ConsultRating

N	Valid	240
	Missing	0
Median		2.0000
Mode		2.00

ConsultRating

	Observed N	Expected N	Residual
1.00	50	60.0	-10.0
2.00	145	60.0	85.0
3.00	42	60.0	-18.0
4.00	3	60.0	-57.0
Total	240		

Test Statistics

	ConsultRating
Chi-Square	181.633[a]
df	3
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 60.0.

Figure 10: Statistical values to determine if sustainability is incorporated in consults. 240 respondents and the p is set at 0.05.

I HAVE SUFFICIENT KNOWLEDGE ABOUT SUSTAINABILITY TO INCORPORATE SUSTAINABILITY IN CONSULTS

Statistics

KnowledgeRating

N	Valid	240
	Missing	0
Median		3.0000
Mode		3.00

KnowledgeRating

	Observed N	Expected N	Residual
1.00	5	48.0	-43.0
2.00	42	48.0	-6.0
3.00	125	48.0	77.0
4.00	65	48.0	17.0
5.00	3	48.0	-45.0
Total	240		

Test Statistics

	KnowledgeRating
Chi-Square	211.000[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 11: Statistical values to determine if store employees' knowledge is sufficient to incorporate sustainability in consults. 240 respondents and the p is set at 0.05.

I WANT TO LEARN MORE ABOUT THESE SUSTAINABLE TOPICS:

Statistics

LearningPolRating

N	Valid	240
	Missing	0
Median		4.0000
Mode		4.00

LearningPolRating

	Observed N	Expected N	Residual
1.00	3	48.0	-45.0
2.00	6	48.0	-42.0
3.00	67	48.0	19.0
4.00	109	48.0	61.0
5.00	55	48.0	7.0
Total	240		

Test Statistics

	LearningPolRating
Chi-Square	165.000[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (0.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 12: Statistical values to determine if store employees want to learn more about Etos' sustainability policies. 240 respondents and the p is set at 0.05.

Statistics

LearningPacRating

N	Valid	240
	Missing	0
Median		4.0000
Mode		4.00

LearningPacRating

	Observed N	Expected N	Residual
1.00	2	48.0	-46.0
2.00	9	48.0	-39.0
3.00	55	48.0	7.0
4.00	117	48.0	69.0
5.00	57	48.0	9.0
Total	240		

Test Statistics

	LearningPacRating
Chi-Square	177.667[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (0.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 13: Statistical values to determine if store employees want to learn more about sustainable packaging. 240 respondents and the p is set at 0.05.

Statistics

LearningIngRating

N	Valid	240
	Missing	0
Median		4.0000
Mode		4.00

LearningIngRating

	Observed N	Expected N	Residual
1.00	1	48.0	-47.0
2.00	5	48.0	-43.0
3.00	48	48.0	.0
4.00	105	48.0	57.0
5.00	81	48.0	33.0
Total	240		

Test Statistics

	LearningIngRating
Chi-Square	174.917[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (0.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 14: Statistical values to determine if store employees want to learn more about natural ingredients. 240 respondents and the p is set at 0.05.

Statistics

LearningResRating

N	Valid	240
	Missing	0
Median		4.0000
Mode		4.00

LearningResRating

	Observed N	Expected N	Residual
1.00	2	48.0	-46.0
2.00	4	48.0	-44.0
3.00	54	48.0	6.0
4.00	120	48.0	72.0
5.00	60	48.0	12.0
Total	240		

Test Statistics

	LearningResRating
Chi-Square	196.167[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (0.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 15: Statistical values to determine if store employees want to learn more about sustainable resources. 240 respondents and the p is set at 0.05.

Statistics

LearningMPIRating

N	Valid	240
	Missing	0
Median		4.0000
Mode		4.00

LearningMPIRating

	Observed N	Expected N	Residual
1.00	2	48.0	-46.0
2.00	4	48.0	-44.0
3.00	45	48.0	-3.0
4.00	110	48.0	62.0
5.00	79	48.0	31.0
Total	240		

Test Statistics

	LearningMPIRating
Chi-Square	184.708[a]
df	4
Asymp. Sig.	<.001

a. 0 cells (0.0%) have expected frequencies less than 5. The minimum expected cell frequency is 48.0.

Figure 16: Statistical values to determine if store employees want to learn more about microplastics. 240 respondents and the p is set at 0.05.

APPENDIX 2: COMMUNICATION MODEL

Table 2: Communication model to assess the sustainable communication on corporate websites. The four pillars are divided into sub-dimensions and criteria.

Pillar	Sub-dimension	Criteria	Author reference
Orientation	About us	References to environmental sustainability	(Siano et al., 2016)
	Sustainability web section	References to environmental sustainability	(Siano et al., 2016)
		Environmental sustainability challenges mentioned	Adapted from (Siano et al., 2016)
Structure	Accessibility	Multilingual functionality	(Siano et al., 2016)
		Sustainability link available under about us/ investor relations	(SanMiguel et al., 2021)
Ergonomics	Navigability	Tools of navigation and search	(Siano et al., 2016)
		Search by default	(Siano et al., 2016)
		Absence of link unreachable	(SanMiguel et al., 2021)
		Further information available	(SanMiguel et al., 2021)
	Usability	Opportunity to go back and on homepage	(Siano et al., 2016)
		Presence of filters and/or categories for sustainable product search	Author
	Interactivity	One-way interaction	(Siano et al., 2016)
		Two-way (bidirectional) interaction	(Siano et al., 2016)
		Consumer participation and co-creation	Adapted from (Siano et al., 2016)
	Multimedia	Video	(Siano et al., 2016)

		Image	(Siano et al., 2016)
		Magazine	(Siano et al., 2016)
Content	Initiatives of corporate sustainability	Sustainable content related to internal operations	(Naidoo & Gasparatos, 2018)
		Sustainable content related to the supply chain management	(Naidoo & Gasparatos, 2018)
	Principle of visibility	Visibility of information about sustainability on the homepage	(Siano et al., 2016)
	Principle of authenticity	Verifiability of information	(Siano et al., 2016)
	Principle of accuracy	Performance achieved in sustainability section	(Siano et al., 2016)
		Section of transparency	(Siano et al., 2016)
	Principle of completeness	Mentioning of the managers in sustainability	Adapted from (Siano et al., 2016)
		Annual updating of sustainability report	(Siano et al., 2016)
		Weekly updates of news on website	(Siano et al., 2016)
	General website content	Current commitment	(SanMiguel et al., 2021)
		Consumer oriented content and text	(SanMiguel et al., 2021)
	Industry-specific sustainability issues as content	Environmental issues	(SanMiguel et al., 2021)
		Sustainable product traceability	Adapted from (SanMiguel et al., 2021)

	Contact, feedback, dialogue	E-mail or contact form for sustainability concerns	(SanMiguel et al., 2021)
		Sustainability newsletter	(SanMiguel et al., 2021)
		Questionnaires/polls/surveys	(SanMiguel et al., 2021)
		Online forum/community	(SanMiguel et al., 2021)
	Sustainable development agenda	Partnership	(SanMiguel et al., 2021)
		Local sustainability developments	(SanMiguel et al., 2021)
		Global sustainability developments	(SanMiguel et al., 2021)
		Objectives for sustainability development	(SanMiguel et al., 2021)
		Membership in sustainability initiatives	(SanMiguel et al., 2021)
	Raise awareness/ activate consumers	Sustainability of products mentioned on website via sustainability labels/product information	Author
		Educate consumers about sustainability: explanation of sustainability labels	Author
		Sustainability tips for at home	Author