ReturnPro

The Consumer Sustainability PROOF  GAP Retail Can’t Ignore

Featuring

The 2026 Sustainability Alignment Index

SURVEY REPORT

Insights from 1,000 U.S. consumers and 300 retail executives on sustainability values, returns, and circularity.

> *"Sustainability is expected, but not decisive without clear proof."*

Contents

A Note from the CEO

This study makes one thing clear: consumers are ready for greater transparency and circularity, but retailer systems, communication, and execution have not kept pace.

The opportunity is significant. Even modest improvements in disclosure, tracking, and recommerce scale can simultaneously:

- Strengthen customer trust
- Protect margins
- Future-proof reverse logistics operations

ReturnPro is committed to helping enterprise retailers close this gap with scalable infrastructure and actionable data.

Regards,
Sender Shamiss
CEO, ReturnPro

> *"Returns have evolved into a defining moment in the customer experience."*

Methodology

This report is based on the ReturnPro Sustainability Study conducted in March 2026.

1,000 U.S. adults who made retail purchases in the past six months (post-stratified by age, income, channel mix, and return behavior).

300 U.S. enterprise retail executives across supply chain, operations, merchandising, customer experience, and eCommerce roles (post-stratified by operating model and primary sales channel).

Executive Summary

Consumer survey insights

85%
Assume most returns get a second life

81%
Want retailers to disclose what happens to returns

60%
Say trust increases with proof of sustainability and circularity

54%
Say proof influences their purchase behavior

Retail is at an inflection point. The rise of eCommerce has transformed how consumers shop, but it has also introduced new complexity, particularly when it comes to returns. What appears on the surface to be a simple transaction carries significant downstream impact, from cost and operational strain to environmental consequences that are largely invisible to the customer.

This report examines the intersection of consumer perception and retailer reality, with a specific focus on returns and sustainability. It explores how consumers think about the impact of their purchasing and return behaviors, what they expect from retailers, and where those expectations diverge from what retailers are actually delivering. The 2026 study reveals a fundamental disconnect in how consumers approach sustainability in retail. While nearly 80% say it is of moderate to high importance that retailers operate sustainably, it ranks last when deciding where to shop, behind price, quality, and convenience. Interest increases when sustainability becomes tangible, particularly in returns and circularity. This is not a gap in belief, but in behavior: sustainability is expected, but not decisive without clear proof.

The next phase of retail will be defined by how effectively this gap is addressed. Consumers increasingly expect transparency and accountability, while retailers are working to operationalize complex and often costly solutions behind the scenes. The opportunity is to bridge that divide by making outcomes more visible, measurable, and credible, transforming what has traditionally been a back-end operational function into a front-end driver of trust, loyalty, and long-term value.

The 2026 Sustainability Alignment Index

Key Findings

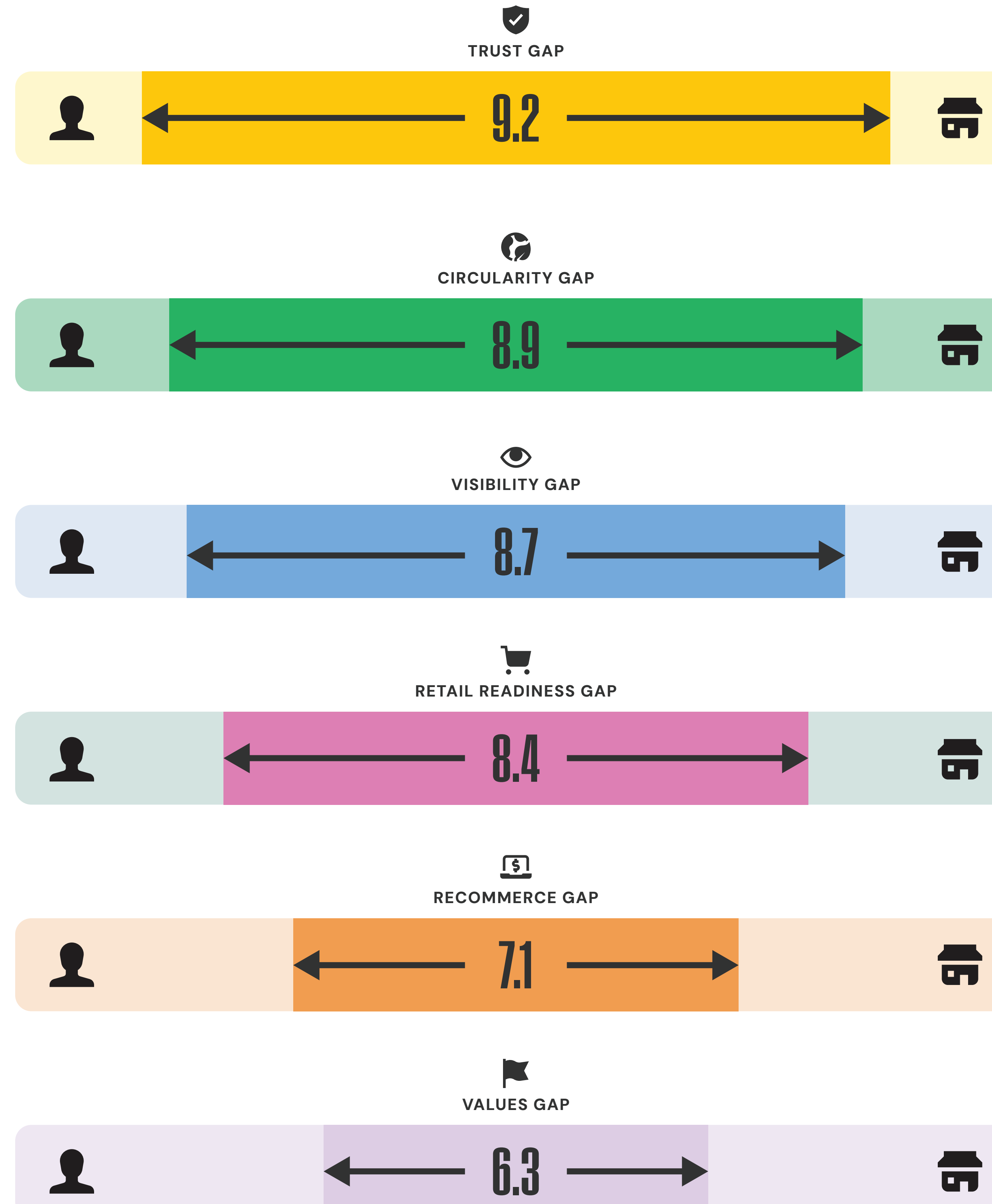
The 2026 Sustainability Alignment Index measures how closely retailer execution aligns with consumer expectations across six key dimensions, referred to as pillars: trust, circularity, visibility, retail readiness, recommerce, and values.

The index translates both consumer and retailer responses into comparable metrics, quantifying the distance between expectation and delivery, where larger gaps signal greater divergence and smaller gaps indicate stronger alignment.

To quantify this distance, we identified the most meaningful and consistent percentage-point differences between consumer expectations and retailer-reported practices within each pillar. These differences were then weighted based on their magnitude, consistency across related questions, and relevance to key business outcomes such as returns, customer experience, loyalty, and margin. The resulting values were normalized onto a 0–10 scale, where higher scores indicate greater divergence.

Within each pillar, we have highlighted one of the most significant areas of divergence to illustrate where misalignment is most pronounced. To explore these dynamics in greater depth, including the full range of responses behind each gap, we invite you to review the detailed consumer and retailer findings in the sections that follow.

OVERALL CONSUMER
SUSTAINABILITY PROOF GAP SCORE



What consumers expect	Gap	What retailers deliver
62% Believe sustainability claims are exaggerated or under-substantiated	TRUST GAP **9.2**	**89%** Are somewhat or very confident that their data would withstand audit

This is not a measurement gap, it is a credibility breakdown. Retailers may have the data, but without clear, tangible, and consumer-visible validation, that data fails to build trust.

What consumers expect	Gap	What retailers deliver
85% Assume returns get a second life	CIRCULARITY GAP **8.9**	**50%** Actually resold or refurbished

This creates a false baseline expectation, which becomes a liability when transparency increases or outcomes fail to meet assumptions.

What consumers expect	Gap	What retailers deliver
81% Want visibility into return outcomes, but **77% have never seen** such disclosures	VISIBILITY GAP **8.7**	**55%** Say they provide disclosure

Retailers believe they are communicating, but consumers are not seeing it. The gap is not in action, but in making that action visible.

What consumers expect	Gap	What retailers deliver
80% Believe that it is somewhat or very important that retailers operate sustainably	RETAIL READINESS GAP **8.4**	**57%** Believe sustainability initiatives risk short-term revenue

Consumers show openness to tradeoffs such as paying more for sustainability (64% of younger vs 42% of older consumers), but retailers are cautious due to percieved short-term risk. This leaves untapped consumer permission that retailers are not fully leveraging.

What consumers expect	Gap	What retailers deliver
82% Open to buying open-box	RECOMMERCE GAP **7.1**	**<5%** Revenue from recommerce

Recommerce is not an emerging trend, it is a proven demand signal that retailers have yet to operationalize at scale, leaving meaningful revenue and margin opportunities on the table.

What consumers expect	Gap	What retailers deliver
54% Expect retailers to take public positions	VALUES GAP **6.3**	**51%** See public positions as a risk

Values-driven churn is a real risk that transparency in returns can help mitigate.

Implications and Actionable Next Steps

Consumers expect significantly more circularity and transparency than retailers currently deliver, particularly in high-return categories such as apparel and footwear. This gap is not theoretical; it directly shapes customer trust, return behavior, and long-term loyalty.

Strategic Implications

Trust impacts experience

The Sustainability Proof Gap is not abstract. It directly affects how consumers perceive the returns experience and whether they trust a retailer's broader sustainability claims.

High-ROI segments lead change

Younger consumers and active returners are the most responsive to proof of reuse and transparency, representing the highest-ROI segments for closing the gap.

Infrastructure is underutilized

Retailers already possess much of the required infrastructure, including SKU-level tracking and resale programs, but are underleveraging it, limiting both customer impact and financial return.

Fix visibility, not capability

The largest disconnect is not in capability but in visibility and activation; what retailers are doing is not being effectively translated into customer-facing proof.

Actionable Next Steps for Reverse Logistics Teams

The Sustainability Proof Gap maps directly to reverse logistics P&L, CX metrics, and loyalty economics. The highest-impact actions below are prioritized by speed of implementation, minimal capital requirements, and measurable effect on return rates, repeat purchase behavior, and resale revenue.

1 Make returns outcomes visible

Insight: 60% say disclosure builds trust; **76%** have never seen it.

Action: Publish what happens to returned products across product pages, checkout, and post-purchase.

Impact: Builds trust and reduces values-driven churn using data already tracked internally.

2 Turn circularity into a conversion lever

Insight: 54% say proof of reuse positively influences purchase decisions.

Action: Surface proof of reuse (resale, recycling) at key decision points.

Impact: Converts existing operational data into a customer-facing driver of purchase and loyalty.

3 Align return policies with reuse outcomes

Insight: 60% would accept stricter returns if reuse is ensured.

Action: Test stricter return policies paired with clear reuse guarantees.

Impact: Reduces return volume and cost without eroding customer experience.

4 Scale resale beyond pilots

Insight: 82% are open to open-box; <**5%** of revenue comes from resale.

Action: Expand open-box and recommerce programs in high-demand categories.

Impact: Transforms returns into a revenue channel while reducing liquidation and waste.

5 Measure and prove carbon impact

Insight: Only **65%** measure it today, limiting credibility.

Action: Start tracking return-related carbon impact and integrate into reporting.

Impact: Strengthens trust, validates claims, and supports ESG alignment.

Consumer Results

Trust: Demand for Transparency

Consumers are shifting how they evaluate sustainability, placing less weight on brand claims and more on whether retailers can demonstrate real, operational outcomes.

82% Want disclosure of return outcomes

59% Say trust increases with disclosure

14% Strongly agree that retailers are honest about their sustainability efforts

What it means: Transparency is not just informational; it is one of the clearest and most actionable ways retailers can build trust.

Circularity: From Values to Behavior

Sustainability and circularity are widely embraced in principle, yet they function as secondary considerations within a broader value equation dominated by price, quality, and convenience. At the same time, consumers increasingly expect retailers to take ownership, creating a dynamic where expectations are high, but adoption is conditional on core performance factors.

70% Say they consider themselves environmentally conscious

85% of omnichannel shoppers value circularity

62% of store-heavy shoppers value circularity

What it means: As visibility increases, trust will reallocate, favoring retailers who can substantiate outcomes over those who cannot.

Visibility: What Consumers Think vs. What They Know

Perception of sustainability is high, but it is largely unverified. Consumers tend to assume responsible outcomes without having visibility into them, creating a disconnect between belief and understanding. As expectations rise, this gap between assumed performance and observable proof becomes a critical point of differentiation for retailers.

86% of online-first shoppers want sustainability disclosure, yet **only 22%** have seen it

76% of store-first shoppers want sustainability disclosure, yet **only 14%** have seen it

What it means: Without visibility, sustainability investments fail to translate into customer preference or revenue impact.

Retail Readiness: Consumers Are Ready to Adapt

Consumers are more flexible than conventional retail thinking suggests; accepting slower shipping, stricter return policies, and even higher prices when sustainability benefits are clearly demonstrated. Rather than rejecting friction outright, shoppers show a clear willingness to adapt their behavior when the environmental impact is tangible and credible.

74% Would accept slower shipping

59% Would accept return policies

53% Would pay more for sustainability

What it means: Consumers are resistant to unclear value, but willing to adapt their behavior when sustainability benefits are clear.

ReCommerce: Demand Does Exist

Recommerce is already embedded in consumer behavior, but its growth is shaped by trust, category sensitivity, and how clearly value is communicated. Adoption is strong for durable goods, while more personal categories still require reassurance, making transparency and proof of reuse critical to unlocking broader participation.

82% Would buy open-box items

61% Have purchased refurbished or open-box items

46% View resale programs as both economically and environmentally positive

What it means: Recommerce is already normalized, but not fully optimized, and retailers that address trust barriers and clearly communicate value will capture disproportionate share.

Values: Alignment Influences Behavior

Consumers are not uniformly activist, but they are far from indifferent. Values and public positions are increasingly part of how shoppers evaluate brands, shaping both perception and behavior. While not always the primary driver of purchase, alignment with corporate values, and especially misalignment, can influence consumer spend.

51% Avoid retailers with conflicting values

54% avoid retailers with conflicting public positions

46% Stopped shopping because of conflicting values/positions

What it means: Values may not drive every purchase, but misalignment can quickly drive customers away.

Retailer Results

Trust: Barriers to Transparency

Retailers do not face a single barrier to transparency, but rather a coordination problem. With concerns spread across operations, legal, data, and brand risk, no function fully owns disclosure, slowing action despite clear consumer demand.

Hard Barriers		Soft Barriers	
29%	22%	27%	22%
Complexity	Data	Legal	Reputational

What it means: Transparency is not constrained by a single limitation, but by fragmented ownership. Progress depends on aligning teams, not just improving systems.

Circularity: From Strategy to Execution

Sustainability and circularity are firmly embedded in corporate strategy. Nearly all retailers recognize its importance, but they are balancing it against real financial pressures.

92%	81%	44%
Rank sustainability as medium or high importance	Say sustainability initiatives pose a risk to short-term revenue performance	Report sustainability efforts have a neutral or negative impact on sales

What it means: Until its financial impact is better demonstrated, sustainability will continue to be treated as a tradeoff.

Visibility: What Retailers Do vs. What Consumers See

Retailers indicate that circular practices are more prevalent than consumers realize, with many products being refurbished, resold, or liquidated rather than discarded. However, this activity is not consistently translated into customer-facing communication. With fewer than half of retailers fully aligning ESG initiatives with brand messaging, circularity is often operationally active but commercially invisible.

44%	46%
Believe consumers underestimate circular operations	Claim that their ESG initiatives are fully coordinated with brand communications

What it means: Circularity is happening, but it is not being monetized, because it is not effectively communicated to customers.

Retail Readiness: Organizations Are Still Catching Up

Retailers are making progress in measuring sustainability, particularly in carbon impact and circularity tracking. However, governance has not fully caught up. While reporting structures are becoming more mature, less than half (**46%**) of retailers tie sustainability performance directly to executive compensation.

65%	57%	75%
Measure carbon impact of returns	Track SKU-level circularity	Have structured or advanced ESG reporting

What it means: Measurement is advancing, but what gets rewarded still determines what gets prioritized.

ReCommerce: Does Value Exist?

Recommerce is already widely adopted, with most retailers operating resale programs, but its financial impact remains uncertain. Nearly half (**47%**) report neutral margin impact, and only **26%** see clear upside, while revenue contribution remains limited and operational costs remain high.

67%	<5%	66%
Run recommerce programs (pilot or scaled)	Revenue contribution from recommerce	Say labor and processing costs are biggest barrier

What it means: Adoption is outpacing profitability, but scaling recommerce requires overcoming cost and operational constraints.

Values: Alignment Drives Impact

Retailers clearly understand that sustainability and corporate values influence how consumers perceive and engage with their brands. These factors are not abstract. They carry real reputational and financial consequences, with most retailers reporting tangible effects tied to sustainability practices and public positioning.

51%	51%	56%
Say values drive consumer decisions	See risk from public positions	Report measurable customer impact

What it means: Values have become a double-edged lever, driving engagement when aligned, and creating risk when mismanaged.

Closing the Sustainability Proof Gap

Across retail organizations, sustainability is embedded in strategy, measured in operations, and increasingly tied to brand and values. But it is not yet consistently activated across the customer journey. Transparency remains limited, accountability is uneven, and communication often lags behind execution.

The result is a disconnect: consumers assume sustainability is happening, while retailers struggle to demonstrate it in ways that influence behavior. This is not a gap in intent. It is a gap in proof.

Returns represent one of the most immediate opportunities to close this gap. They sit at the intersection of operations, customer experience, and sustainability, making them a uniquely powerful moment to validate circularity, reinforce values, and build trust. The opportunity is not to build more, but to better activate and expose what already exists, translating existing systems, data, and strategies into consistent, customer-visible experiences.

Retailers that activate this moment effectively will do more than improve returns. They will translate sustainability into a visible, measurable driver of trust, loyalty, and revenue.

In a commercial environment where transparency and values increasingly shape consumer decisions, advantage will not come from only doing more, but from creating visibility to what is already being done. Those that close this gap first will set the next standard for retail.

> *"The next phase of retail sustainability is not execution. It is proof."*

ReturnPro
Solving Returns

Are you ready to think outside the box?

Let’s Solve Returns. Together.

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