

# SUSTAINABLE E-COMMERCE

•• THE CHAMBER OF  
DIGITAL ECONOMY | 2022



REPORT AUTHOR

RESEARCH AND ANALYSIS

GENERAL PARTNERS



# Introduction

▶ E-commerce is an integral part of modern life. Consumers are getting goods and services with one click. They can import them from almost anywhere in the world. Recent months have shown a surge in FMCG sales, including online groceries, with delivery to the door.

The growth in e-commerce has been a boon for consumers, who can now search for the best deals for themselves. And here the question arises - what does the best deal mean? Is it followed by respect for the environment by the manufacturer, the supplier, throughout the value chain? Are consumers taking into account human rights in business?

By giving you another edition of the „Sustainable e-commerce " report, we want to keep the dialogue on the responsibility of e-businesses for their products, services and customers. We believe that managers are guided by ethics and responsibility. They take responsibility for the actions of the brands they lead and can help create a safe and trustworthy e-commerce environment. This is good for both companies and consumers and will help ensure the continued growth of e-commerce.

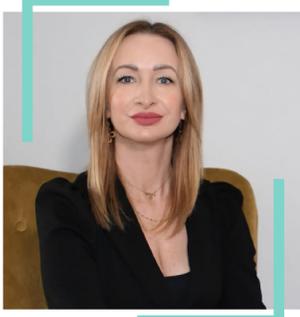
Similarly - customers, as awareness and expectations of ESG (environment, social, governance) increase - will be guided by responsibility when shopping. By doing so, they will also increase companies' commitment to sustainability.

The Chamber of Digital Economy actively participates in the e-commerce development process , constantly educates Polish consumers and e-entrepreneurs and supports them in building business relationships to reach beyond our country's borders as well. For almost 10 years, e-Chamber, together with the wonderful affiliates that make up its strength, has made significant contributions to the development of e-commerce in Poland and Europe.

We stand up for the interests of both sellers and buyers. We invite you to cooperate in all ongoing legislative projects and activities within the framework of THE SAME START and the POLISH DIGITAL ECONOMY! PACKAGE OF CHANGES, School of Digital Economy, Responsible e-commerce Project, Competitions: e-Commerce Poland awards, e-Commerce Director of the Year, Performance Marketing Diamonds EU. We also invite you to cooperate with us in 2023: <https://eizba.pl/wp-content/uploads/2022/10/Plany-e-Izby-2023.pdf>.

More about the activities of the Chamber of Digital Economy on our website [www.eizba.pl](http://www.eizba.pl).

I wish you enjoyable and enriching reading,



**Patrycja Sass-Staniszevska**

CEO  
CHAMBER OF DIGITAL ECONOMY

# Key findings

Consumers

▶ 1

## What is sustainable development?

Knowledge of sustainability concepts has improved among consumers this year, albeit slightly. What is ethics in e-commerce is now known to 17% of respondents (+4p.p.). In contrast, the level of knowledge of what sustainability is in the economy remained unchanged, i.e. knowledge of the concept is declared by 15% of respondents. Awareness of what SD (sustainable development) means, i.e. sustainability in business or socially responsible business, is 13% of consumers, compared to 8% in October 2021.

## E-knowledge

The role of the Internet and digital media in spreading awareness of sustainability has increased significantly. This year, respondents were much more likely to learn about issues related to this topic from news sites or social media, and much less likely to learn about them from television and the workplace.

▶ 2

▶ 3

## How to choose e-shop?

When choosing an e-store, consumers pay attention primarily to low prices, assortment, promotions and delivery methods, very practical factors, but various sustainability-related elements are taken into account by 35% of e-consumers. On the other hand, when choosing a product in an e-store, various SD-related aspects matter to as few as 5 in 10 online shoppers.

## Is ecology a „must be“?

73% of Internet users declare that operating an e-business in accordance with SD principles has a positive impact on the image in their eyes. In turn, 67% of consumers say they consider whether an e-store is a sustainable business when shopping online. This is +9pc more than a year ago, with the percentage of "definitely yes" responses increasing by +10pc and the importance rating of this element rising from 3.76 to 4.19.

▶ 4

▶ 5

## Attention, consumer is watching!

No non-environmental practices of e-stores are perceived by only 26% of respondents. Leading such practices were again: packing small products in parcels that are too large, and packing food products in plastic bags and commercials. More often than a year ago, however, e-consumers surveyed recognized the problem of lack of pickup options at dedicated outlets, which are increasingly important in e-commerce.

# Key findings

Consumers

▶ 6

## Polish e-commerce more responsible

According to Internet users, it is Polish e-shops, not foreign ones, that are more active in responsible e-commerce (38% vs 18%). Respondents also increasingly recognize that a greener approach gives Polish e-entrepreneurs an advantage over foreign sellers (62% vs. 55% a year ago).

## No turnaround on returns

Consumers point to good descriptions, photos and information about the composition of products as elements that support conscious online shopping and therefore reduce the risk of returns. Unfortunately, despite these indications, the majority still does not consider returns in e-commerce as an activity with negative consequences for the environment. A year ago, 50% of respondents recognized such a relationship, while today it is only 34%.

▶ 7

▶ 8

## Best solutions are handy

In socially positive e-commerce activities, only 22% of respondents say they are participating so far. If consumers are already engaged in SD activities in e-commerce, it is primarily choosing the option of delivery of all products at one time, followed by a surcharge for eco-friendly packaging, as well as a surcharge for CO2 offsets, which is what the e-store can offer as an option of choice when e-commerce shopping.

## Do e-shops listen?

As a year ago, consumers' opinions on whether companies take into account customer reports of unethical behavior are divided. Fifty-seven percent of respondents are in favor of "yes," while 43% hold the opposite view (vs. 58% and 42% a year ago).

▶ 9

▶ 10

## Crisis is not good for ecology

The eco-friendly aspect of product packaging is paid attention to by 61% of Internet users. This is +6pc more than in 2021. However, the willingness to pay a surcharge for eco-packaging has dropped significantly this year. It is declared by 28% of respondents, compared to 42% a year ago. If consumers were already to pay a surcharge, it will be a maximum of PLN 5, but most would like to pay only PLN 2.

# Key findings

E-business

1

## Knowledge about SD is growing

The concept of ethics in e-commerce is known to as many as 96% of surveyed managers. What responsible business is, meanwhile, 92% of those surveyed know, compared to 61% in 2021. The concept of sustainability, on the other hand, is known to 94% of e-companies. A year ago, the figure was 75%.

## Stratega to be improved

Their company as one that acts responsibly was rated by 100% of respondents this year, but a year ago it was slightly less, at 98%. In contrast, a much smaller number, about half of e-firms (47%), still have guidelines for responsible development and e-business.

2

3

## Dialogue more and more important

Education of their customers on SD is carried out by 45% of the surveyed companies. A year ago it was very similar. However, it is more common to inform customers about a company's or brand's SD activities across channels. This is now done by 63% of e-companies vs. 47% a year ago. Market feedback has also gained in importance. Satisfaction levels of customers, employees or business partners are already surveyed by 94% of companies compared to 75% in 2021.

## SD means benefis

100% of surveyed e-companies indicated that they benefit from doing business responsibly. This is +9p.p. more than a year ago. Again, image benefits are the most common, now indicated by 90% of companies (vs. 70% a year ago), but strategic and brand development benefits came second this time, followed by very important economic benefits, appreciated by 65% of e-entities.

4

5

## Employee in the spotlight

The most commonly used sustainability tools have changed from last year. Companies have now placed a primary focus on employees, with more than 80% indicating employee development paths and a code of ethics, and almost 70% indicating employee surveys. These elements were also in the top 5 indications a year ago, but had a much lower number of votes (about 40%). Fewer companies, on the other hand, indicated this year the implementation of environmentally friendly technologies and innovations, perhaps due to the specter of the crisis, which is not conducive to large investments.

# Knowledge and attitudes

## Highlights

- ▶ Knowledge of sustainability-related concepts is still low among Poles. What is ethics in e-commerce is now known to 17% of respondents, compared to 13% a year ago (+4p.p.). In contrast, the level of knowledge of what sustainability is in the economy remained unchanged, i.e. knowledge of the concept is declared by 15% of respondents.
- Knowledge of the concept of responsible business looks slightly better this year. Here, awareness of what SD (sustainable development) is reached 13%, compared to 8% in September 2021.
- In contrast, contact with the concept of ESG, which we surveyed for the first time this year, is declared by almost one in four respondents (23%).
- The role of the Internet and digital media in spreading awareness of sustainability has increased significantly. This year, respondents were much more likely to learn about issues related to this topic from online news portals or social media, and much less likely to learn about them from television and the workplace.
- Consumers consider the most environmentally unfriendly e-commerce practices to be, in turn, the use of foil to package shipments, the packaging of food products in plastic bags and commercials, as well as the packaging of small products in large packages and the use of fillers. No unethical or non-environmental practices of e-stores were noticed by only 1/3 of respondents, and among online shoppers the most common was 8%.
- Consumers believe that e-stores can support a more conscious, and therefore eco-friendly, shopping experience in a number of ways, including making it possible to search for products with certificates, as well as choosing single-shipment delivery, and presenting accurate product descriptions and photos in e-offers, which can reduce the number of potential returns.

**GRAPH 1**

Do you know what the concept of economic sustainability means?  
*E-commerce. Sustainable and Ethical 2022 Report, N=1709, all respondents*  
*E-commerce. Sustainable and Ethical 2021 Report, N=1530, all respondents*



**GRAPH 2**

Have you ever come across the term SD (sustainable development) - sustainable development or CSR - socially responsible business?  
*E-commerce. Sustainable and Ethical 2022 Report, N=1709, all respondents*  
*E-commerce. Sustainable and Ethical 2021 Report, N=1530, all respondents*



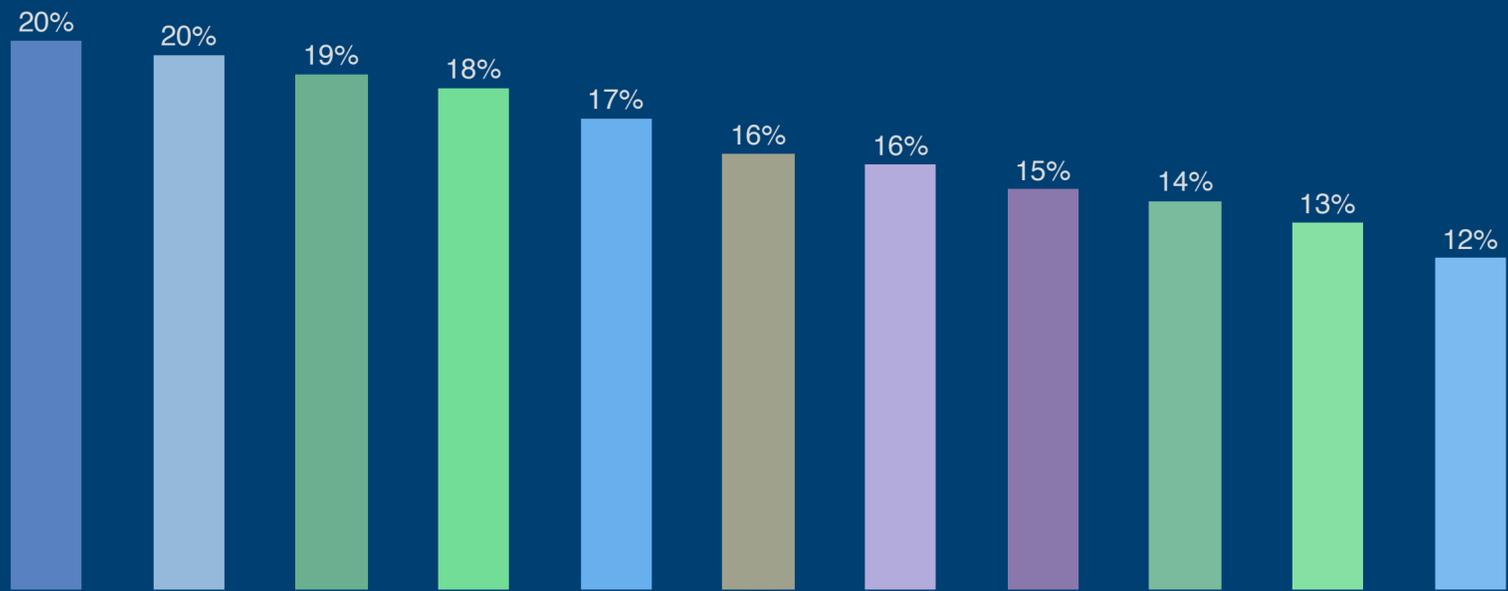
**GRAPH 3**

Have you ever come across the term ESG (where E stands for environment / environment, S for social responsibility / social responsibility, and G for corporate governance / corporate governance )?  
*E-commerce. Sustainable and Ethical 2022 Report, N=1709, all respondents*  
*E-commerce. Sustainable and Ethical 2021 Report, N=1530, all respondents*



GRAPH 4

If you had to say what responsible e-commerce is, it would be...?  
*E-commerce. Sustainable and Ethical 2022 Report, N=1709, all respondents*  
*E-commerce. Sustainable and Ethical 2021 Report, N=1530, all respondents*



- offering in the e-store the choice of eco-friendly packaging of purchased products or delivery for an additional fee
- not to offer products manufactured by the e-tailer in an unethical, unsafe or unenvironmental manner
- accessibility of the parcel machine for people with special needs (wheelchair users, parents with strollers, etc.).
- e-shop shipping of products in special returnable packaging
- e-tailer's quest for climate neutrality
- donation by the e-tailer of a certain amount from each product purchased to some positive cause
- e-shop offering the possibility of a surcharge to compensate for the carbon footprint
- offering by the e-store the possibility of return by means of a parcel machine or other dedicated point
- offering eco-friendly delivery and packaging as standard in the e-store = no extra charge
- increasing the accessibility of the e-store for people with special needs, such as those with low vision
- e-tailer's support of pro-social, pro-environmental, local initiatives

# Strategic business approach

## Highlights

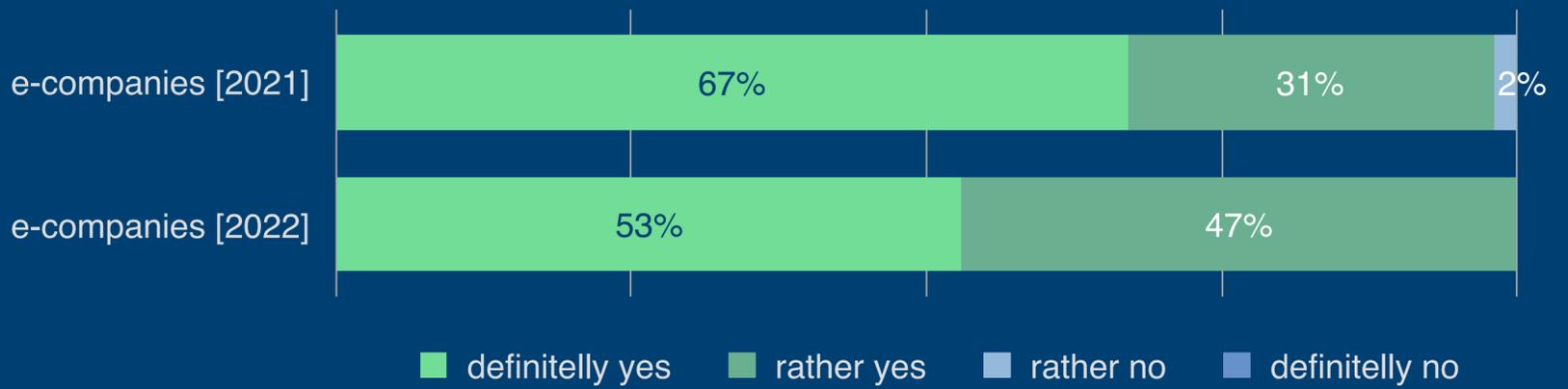
- ▶ Knowledge of the concepts of sustainability, sustainable e-business, and ethics in e-business is very high among managers. They are known to 9 out of 10 respondents.
- At the same time, managers also rate very highly the proximity of the aforementioned ideas in their companies. In no case did the rating fall below 5 on a scale of 1-6.
- All companies (vs. 98% a year ago) declared that they act responsibly towards employees, customers, the environment, suppliers, business partners, and thus operate in the area of corporate social responsibility. Strategic directions for responsible e-business, however, were set in far fewer surveyed entities (47%), and sustainability goals were included in the strategies of 6 out of 10 of them.
- Managers indicate an increasing number of motives why sustainability principles are being implemented in companies. Increasingly, it is a matter of company principles, not just a desire to build a positive image. The standards of the market, industry and business partners cooperating with companies are also gaining in importance.

**GRAPH 5**

Does the company where you work act responsibly towards employees, customers, the environment, suppliers, business partners (operates in the area of corporate social responsibility)?

*E-commerce. Sustainable and Ethical 2022 Report, N=53, e-business*

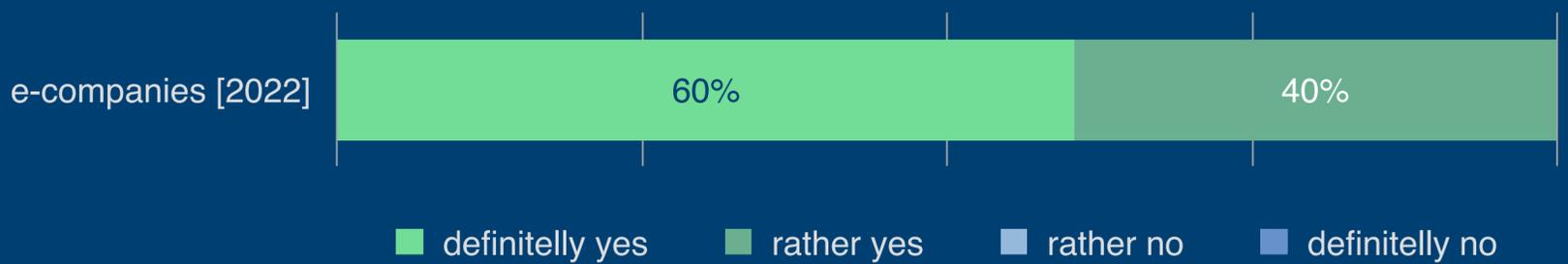
*E-commerce. Sustainable and Ethical 2021 Report N=54, e-business*



**GRAPH 6**

In your opinion, does the company conduct e-commerce in a responsible/ethical manner?

*E-commerce. Sustainable and Ethical 2022 Report, N=53, e-business*

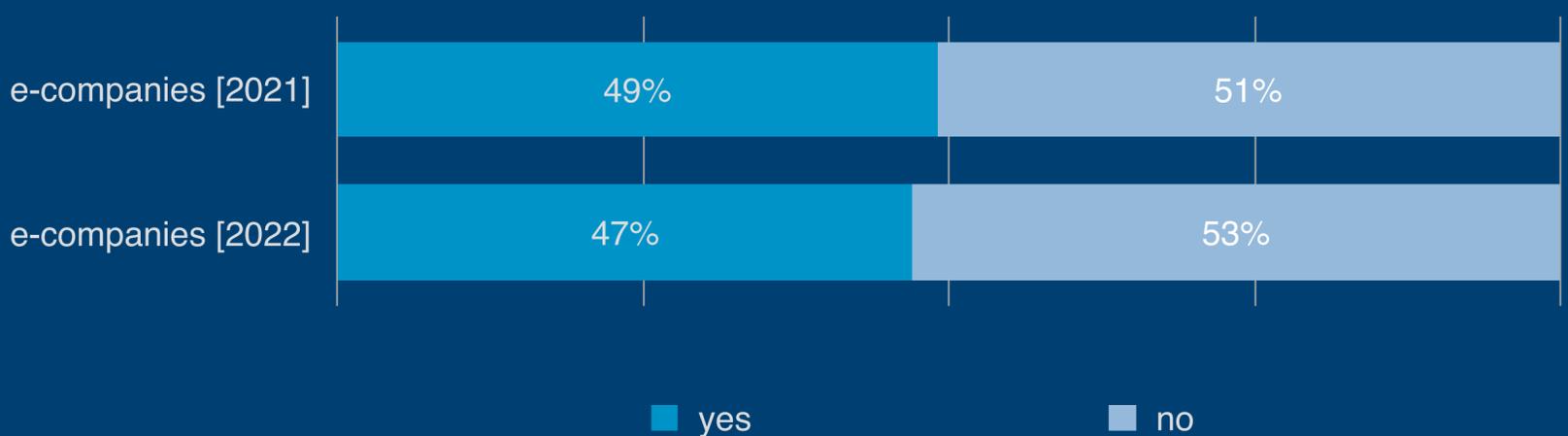


**GRAPH 7**

Does the company where you work have strategic directions for responsible e-business?

*E-commerce. Sustainable and Ethical 2022 Report, N=53, e-business*

*E-commerce. Sustainable and Ethical 2021 Report N=53, e-business involved in CSR*

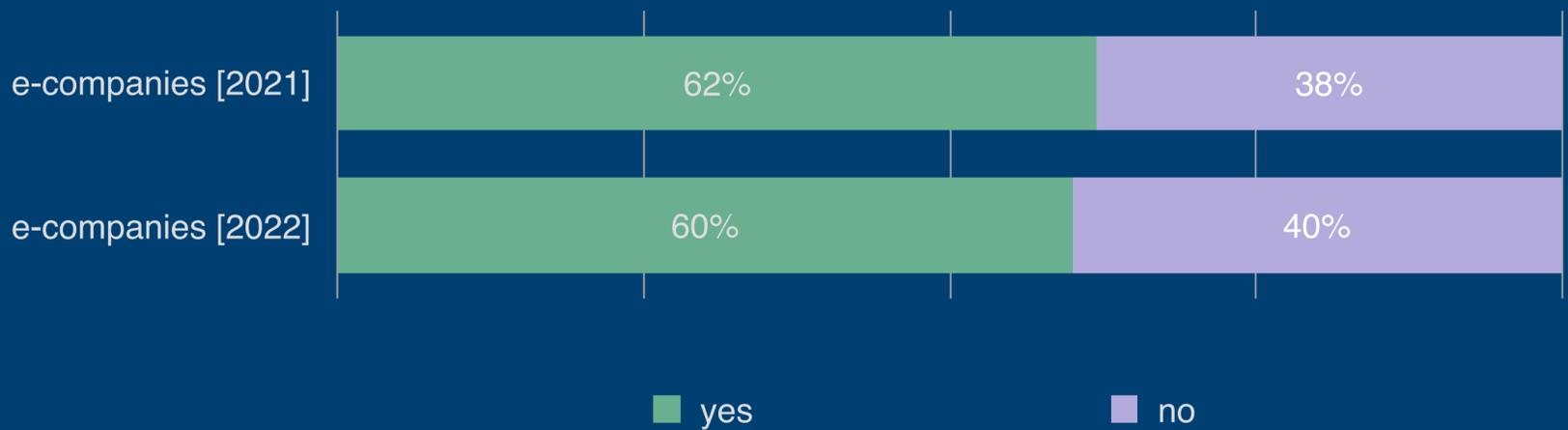


GRAPH 8

Are SD (sustainable development) activities embedded in the strategy of the company where you work?

*E-commerce. Sustainable and Ethical 2022 Report, N=53, e-business*

*E-commerce. Sustainable and Ethical 2021 Report N=53, e-business involved in CSR*

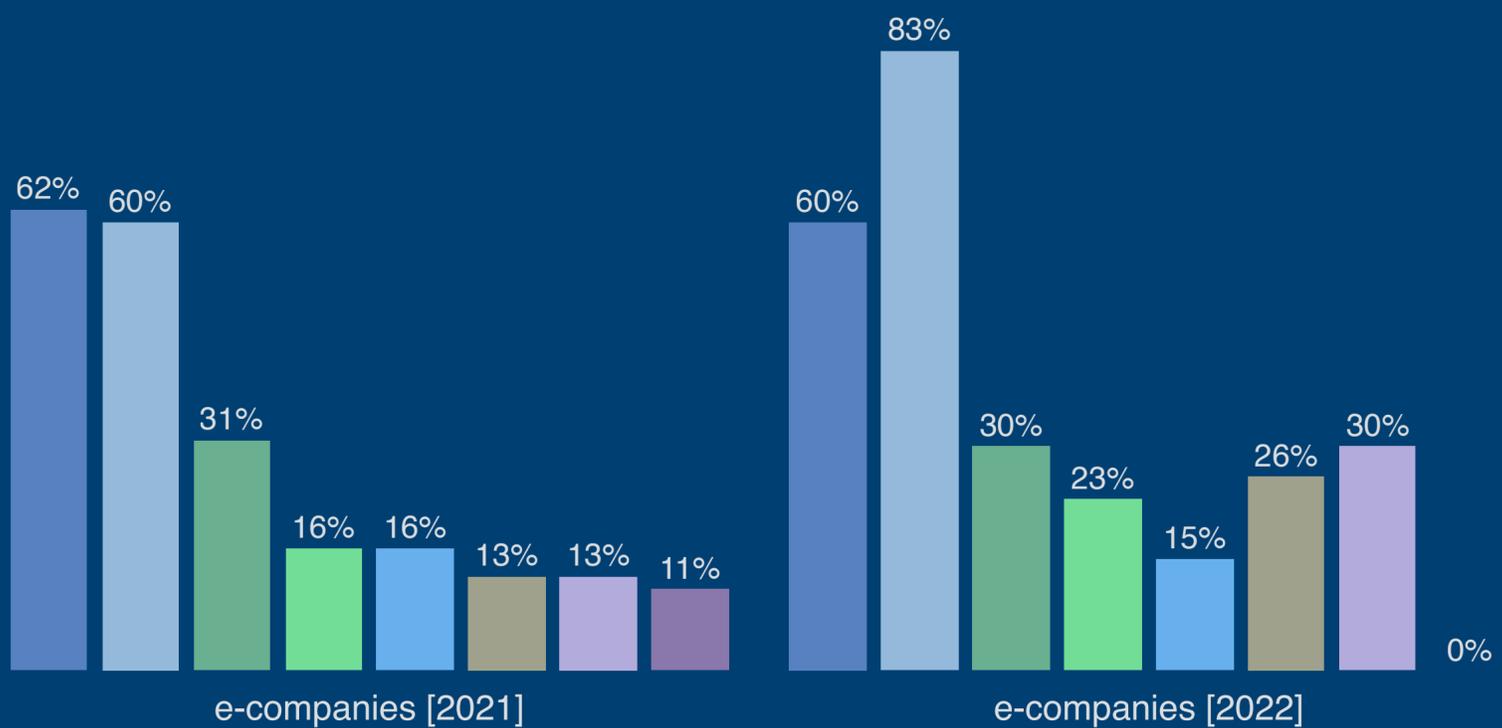


GRAPH 9

What are the motives for implementing SD activities at the company where you work?

*E-commerce. Sustainable and Ethical 2022 Report, N=53, e-business*

*E-commerce. Sustainable and Ethical 2021 Report N=54, e-business*



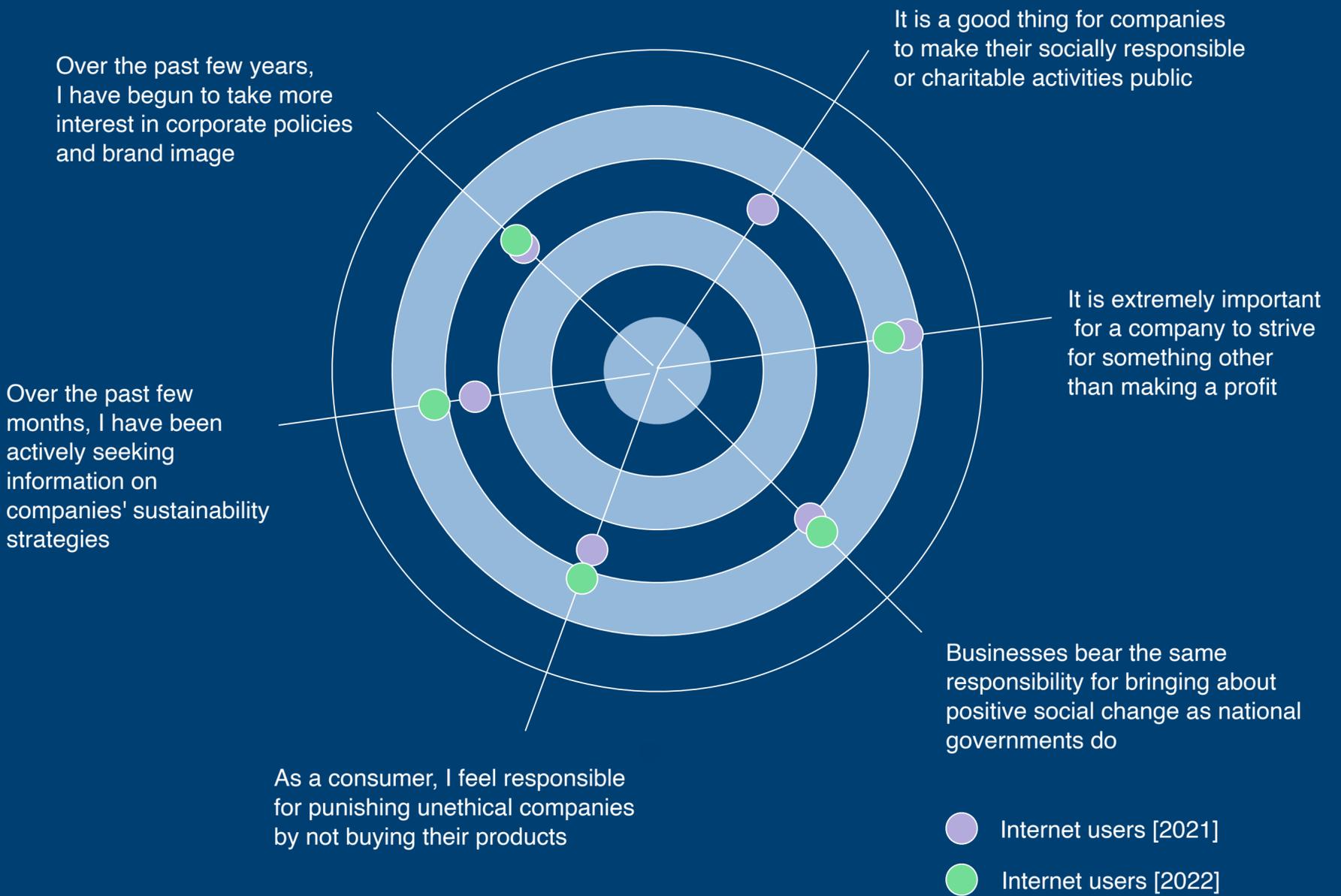
- this is due to the desire to build a more positive corporate image
- this is due to the values that are held in the company
- nowadays, companies simply cannot fail to implement SD activities
- is due to requirements from contractors
- are requirements imposed in advance by the company's foreign headquarters
- this is due to legal requirements
- są to wymagania nałożone przez branżę, w jakiej działa firma
- none of the above

# Pandemic impact Highlights

- ▶ ● Poles have become accustomed to pandemic conditions and most declare that they are not currently changing their purchasing behavior in response to its next waves.
- Instead, in the pandemic years, Polish consumers have begun to pay increasing attention to whether companies are operating in a sustainable manner and to actively seek information in this regard.
- Despite this increased interest and sense of responsibility, the willingness of respondents to report unethical practices has unfortunately declined - from 47% in 2021 to 24% today.
- Poles, on the other hand, have a growing sense that if they were to report such unethical practices, their information would be accepted and taken into account by e-companies.

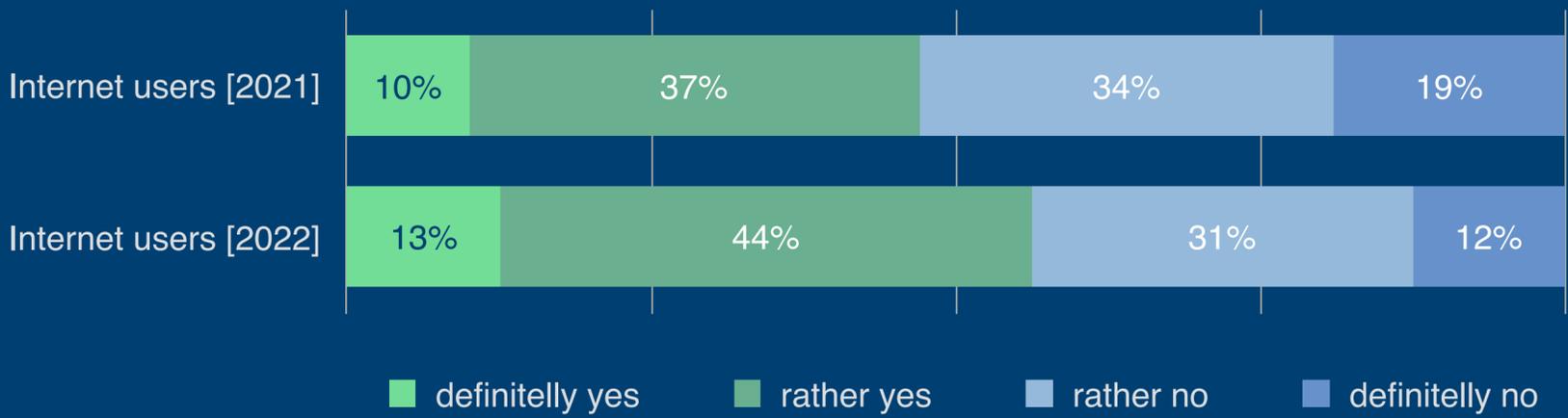
**GRAPH 10**

To what extent do you agree with the following statements?  
*E-commerce. Sustainable and Ethical 2022 Report, N=1709, all respondents*  
*E-commerce. Sustainable and Ethical 2021 Report, N=1530, all respondents*



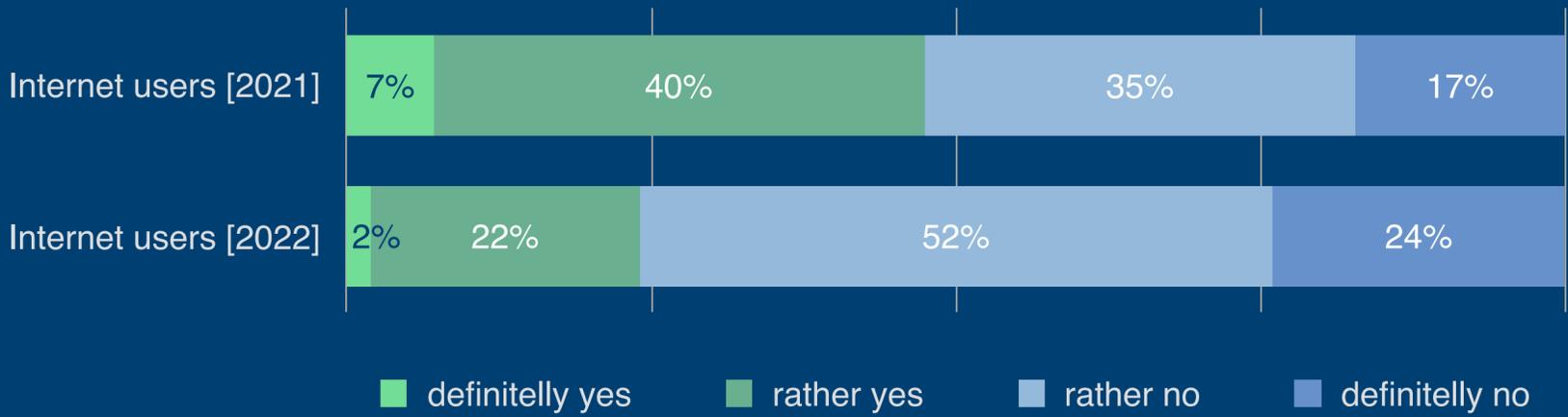
**GRAPH 11**

In your opinion, do companies take into account consumer reports of unethical or environmentally harmful activities?  
*E-commerce. Sustainable and Ethical 2022 Report, N=1709, all respondents*  
*E-commerce. Sustainable and Ethical 2021 Report, N=1530, all respondents*



**GRAPH 12**

If you had the opportunity, would you report a company that its practices are unethical or harmful to the environment?  
*E-commerce. Sustainable and Ethical 2022 Report, N=1709, all respondents*  
*E-commerce. Sustainable and Ethical 2021 Report, N=1530, all respondents*

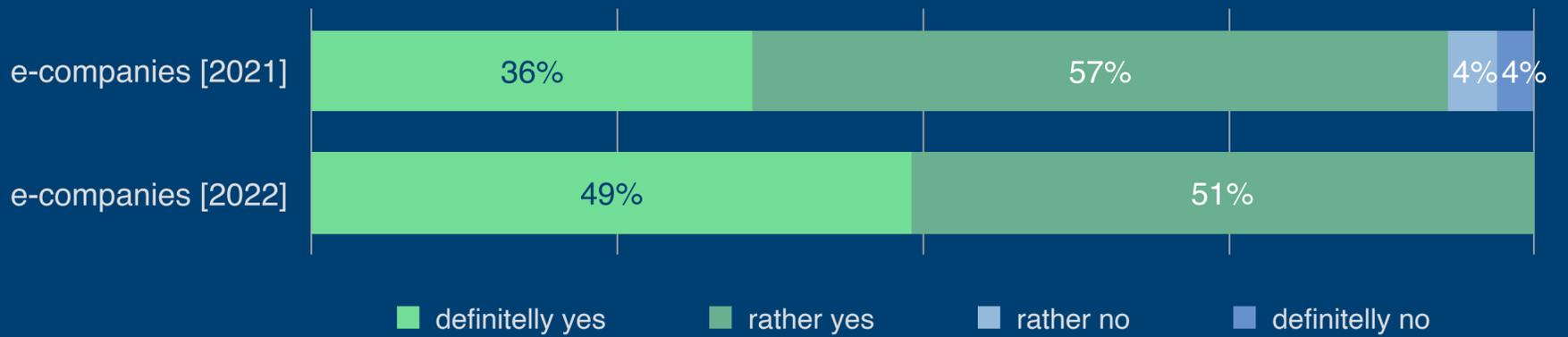


# Sustainable e-market Highlights

- ▶ Over the past year, e-business has significantly intensified SD activities in most of the areas surveyed. Those related to human resources, i.e. respecting the rights of e-customers and employees, have gained the most importance. In contrast, companies invested to a lesser extent in modern pro-environmental solutions.
- The most popular SD activity in the area of responsible product and supply chain is now the implementation of innovations and technologies to reduce negative impacts on the environment (45% vs. 52% a year ago). The top SD activity in respecting e-customer rights is the creation of e-customer service standards practiced by 78% of surveyed companies. In terms of environmental protection, the most popular SD activity this year turned out to be environmental education of employees and customers (71%), and the activity in the area of responsible relations with employees - taking care of development and improvement of professional skills (75%). In the context of social responsibility, it is cooperation with environmental organizations (59%).
- When it comes to educating customers about SD, 43% of the surveyed companies do it. A year ago it was very similar. However, it is more common to inform customers about the company's SD activities through various channels. This is now done by 60% vs. 47% a year ago. Shopping incentives for choosing eco-friendly packaging and reducing returns were introduced for their e-customers by 53% of surveyed companies.
- Interestingly, none of the companies surveyed yet employs an Ethics Officer. Perhaps this is the potential for a new position at companies sorting out the issue of reporting ethics violations.
- The scrutiny of potential business partners for social responsibility has increased significantly. Suppliers, vendors, subcontractors or manufacturers are already checked by 2/3 of companies before starting cooperation.
- Seventy-two percent of surveyed companies are involved in helping Ukraine. First of all, these are collections, but also support of Ukrainian workers and their families in the immigration process. 4 out of 10 companies financially support charitable organizations engaged in helping Ukraine. Every 5th e-company has broken cooperation with companies from Russia and Belarus, and 17% have withdrawn from these markets.
- It is much more common for companies to survey the opinions and satisfaction levels of their business partners. Only 6% of surveyed entities do not conduct satisfaction surveys.

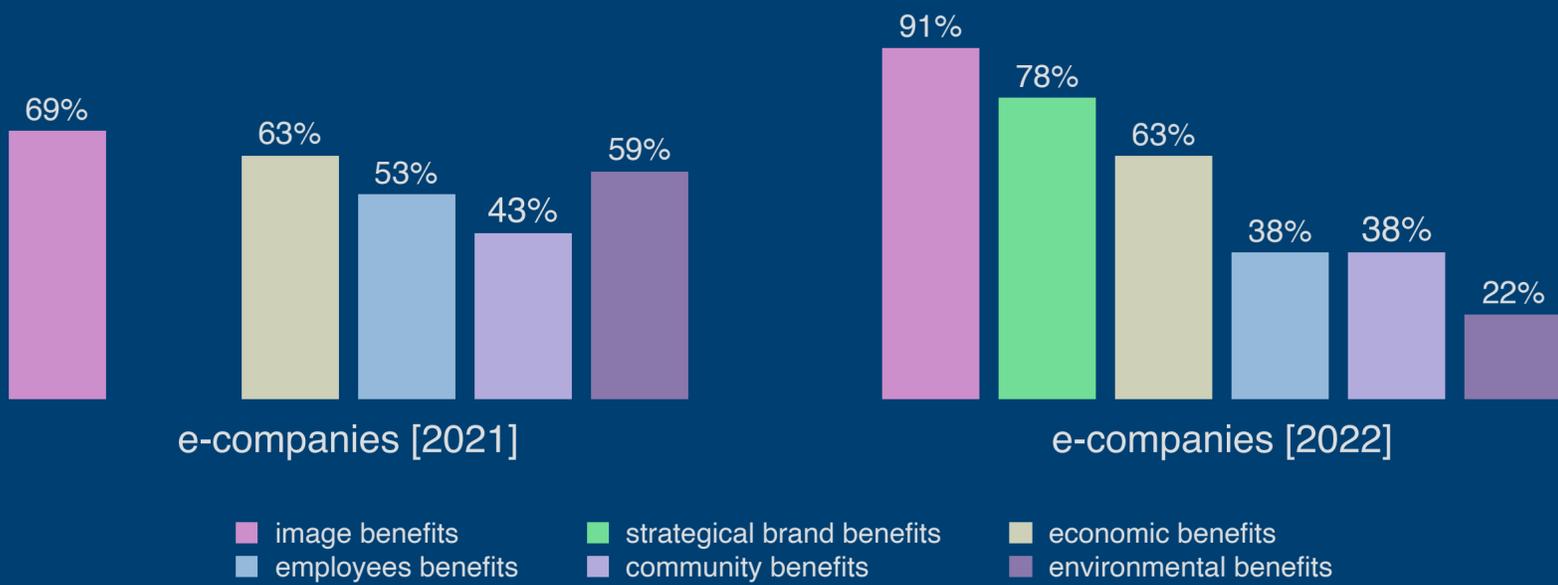
**GRAPH 13**

Does the company benefit from doing business in a responsible/ethical manner?  
*E-commerce. Sustainable and Ethical 2022 Report, N=53, ethical e-business,*  
*E-commerce. Sustainable and Ethical 2021 Report N=53, e-business involved in CSR*



**GRAPH 14**

What areas are affected by these benefits?  
*E-commerce. Sustainable and Ethical 2022 Report, N=53, ethical e-business,*  
*E-commerce. Sustainable and Ethical 2021 Report N=53, e-business seeing benefits from SD*



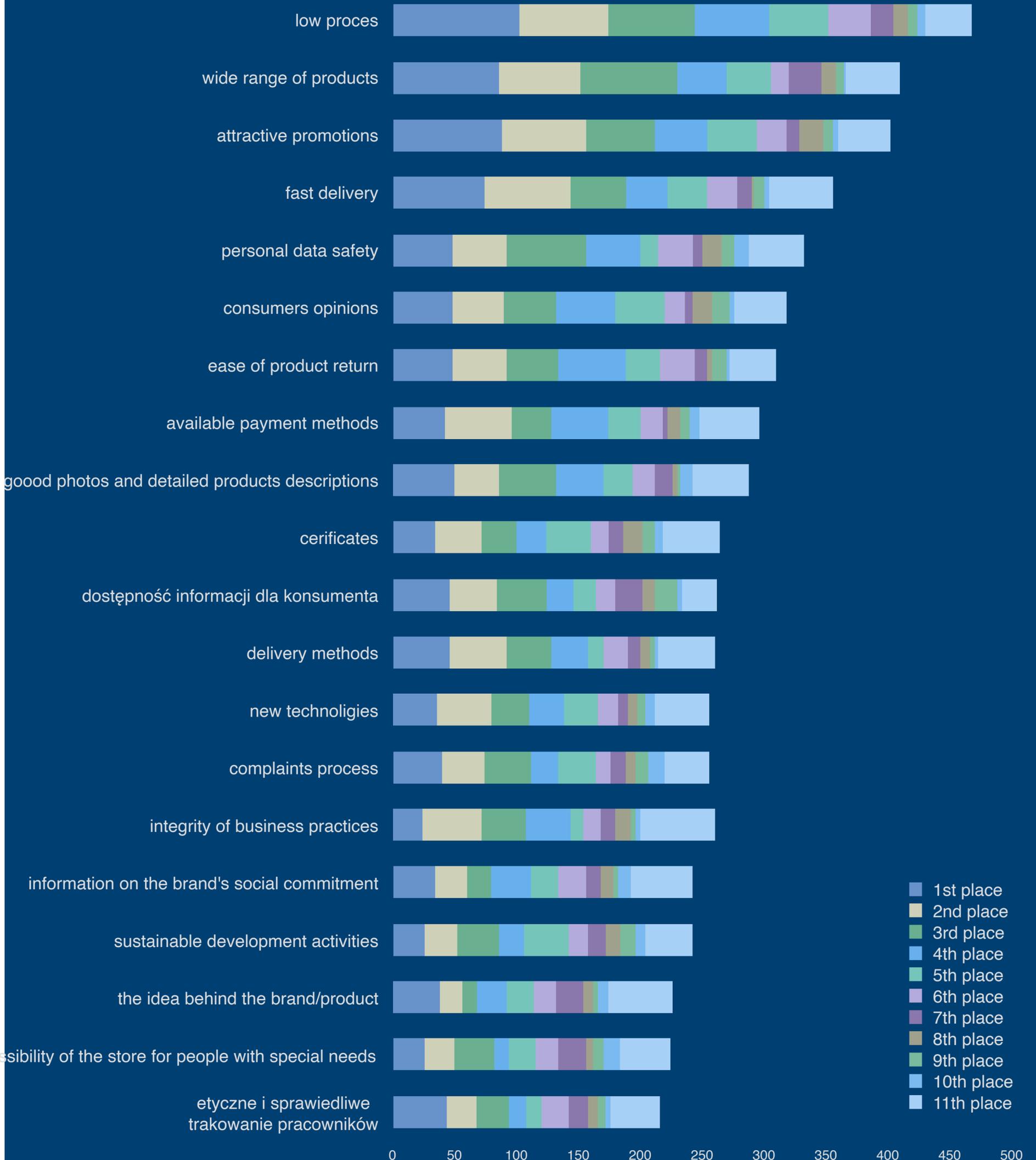
# Conscious consumers

## Highlights

- ▶ Although the primary factors in choosing an e-store and e-commerce product are still very pragmatic, overall, sustainability aspects are taken into account by 35% of surveyed e-customers when choosing an e-store, and more than half of Internet users when choosing e-commerce products.
- 38% of the surveyed, and 50% of e-buyers declare that the visible actions of e-shops in the area of SD positively influence their purchasing decisions.
- 41% of Internet users say they check whether an e-store sells certified products, and 30% say they publish social reports.
- Polish consumers are very conscious when it comes to choosing an e-store that offers convenient purchase conditions. The return policy is paid attention to by 61% of respondents, and complaints issues by 65%.
- Consumers are able to wait longer for delivery, but are less likely to accept the fact that it is related to ecological issues, i.e. reducing CO2 emissions.
- Still only 1/3 of respondents believe that returns of products purchased online have negative consequences for the environment.
- The most convenient channel of communication with an e-shop is no longer email for customers, but rather phone, Messenger or dedicated tools like chat bots, widgets or forms on e-shop websites,
- Only 1/4 of consumers say they would report an e-store for violations of standards or unethical activities, but in turn, respondents expect online companies to inform them about positive sustainability measures and educate them about safety.

GRAPH 15

What factors do you consider when choosing an e-commerce store?  
*E-commerce. Sustainable and Ethical 2022 Report, N=1709, all respondents*

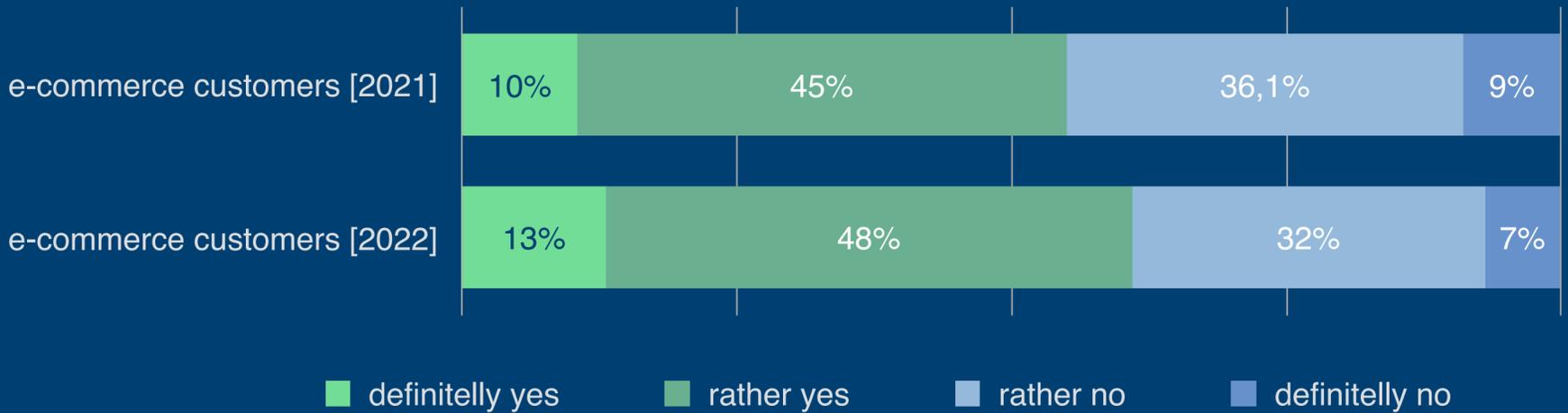


**GRAPH 16**

When choosing an online store, do you take into account whether the vendor is a responsible, sustainable company?

*E-commerce. Sustainable and Ethical 2022 Report, N=980, e-commerce customers*

*E-commerce. Sustainable and Ethical 2021 Report, N=735, e-commerce customers*

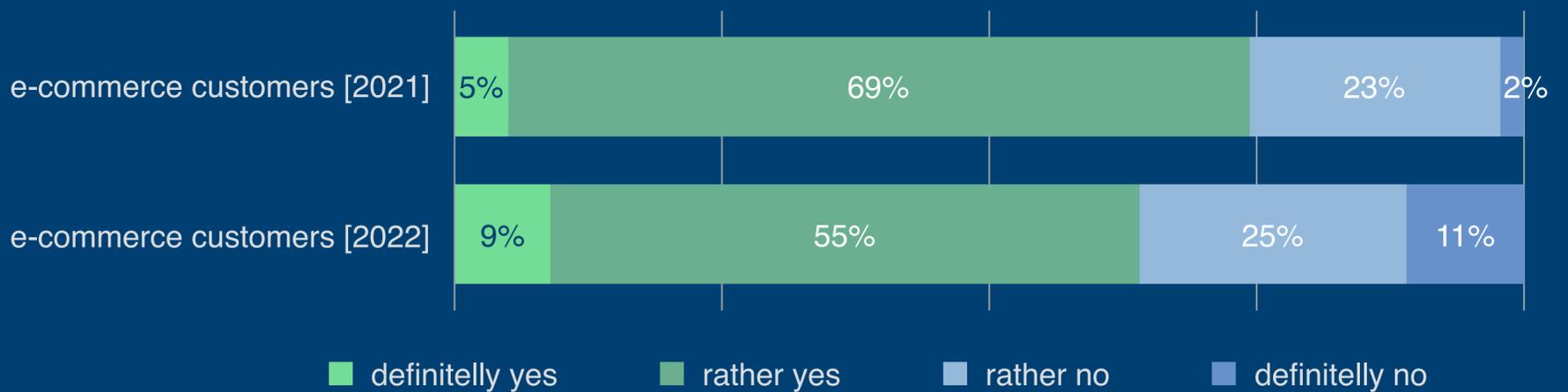


**GRAPH 17**

Does an e-store's active sustainability or responsible business practices positively affect its image in your eyes?

*E-commerce. Sustainable and Ethical 2022 Report, N=980, e-commerce customers*

*E-commerce. Sustainable and Ethical 2021 Report, N=735, e-commerce customers*



# Dose of data

## ▶ ATTITUDES IN A CRISIS YEAR

60%

respondents expect the package they ordered from the e-store to be delivered within 3 days of placing the order. 15% are only able to wait 2 days, and 4% are able to wait one day. Consumers are more patient than a year ago, when as many as 30% of respondents expected a package within 2 days.

56%

e-consumers would be able to wait longer for a shipment if the e-store in question shipped all the products they ordered in one delivery. That's down -13pc from a year ago. Unfortunately, ecology is less of a justification for waiting longer for a product.

61%

e-consumers declare that they pay attention to whether the shipment the e-store has sent is packaged in an environmentally friendly way (no plastic, friendly packaging, etc.). This is -10pc less than a year ago. A surcharge for such an option is wanted by 38%.

## THE NEGATIVE IMPACT OF RETURNS

Only one in three Internet users believes that returns have negative consequences for the environment. E-buyers are slightly more aware, as in this group the negative impact of returns is perceived by 46% of respondents.

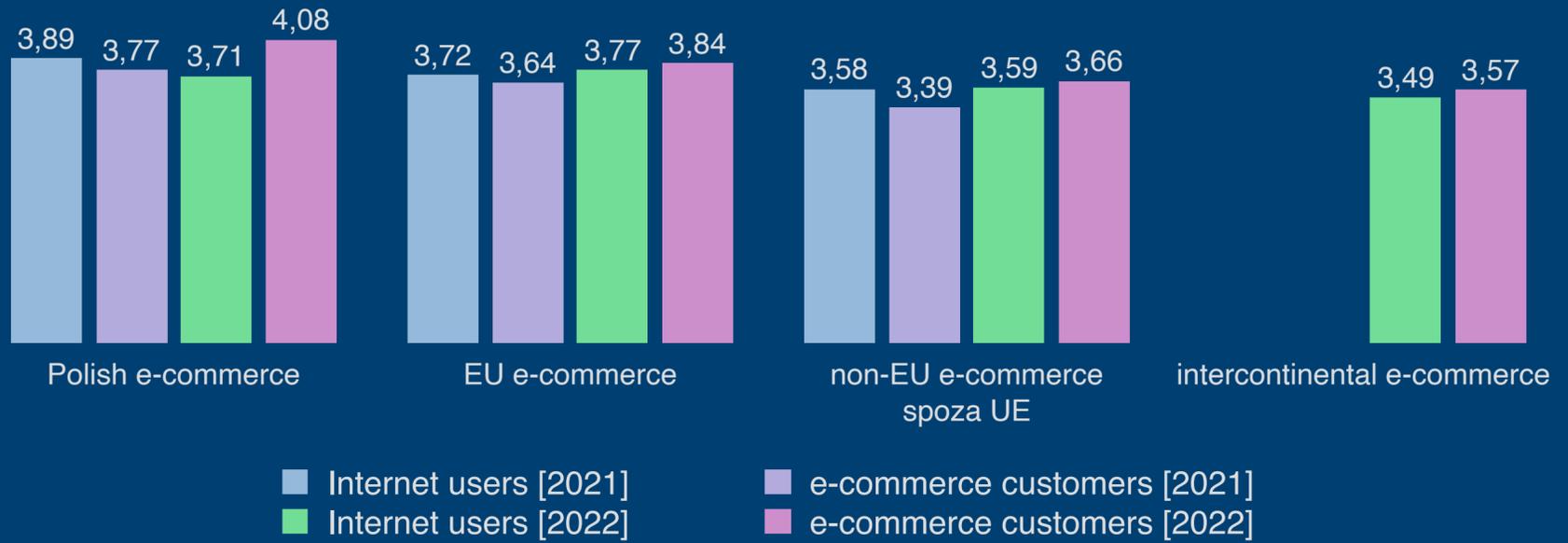
# SD future in e-commerce

## Highlights

- ▶ The Polish e-commerce market as socially responsible received a rating of 4.08 from e-buyers this year, compared to 3.89 a year ago. The EU market was again rated little worse, receiving a rating of 3.84, while the non-EU market received a rating of 3.58. The intercontinental market received the lowest rating.
- In terms of caring for the environment, the Polish e-commerce market is now rated at 3.74, which in turn is worse than a year ago (3.81).
- According to e-customers, it is Polish e-shops and not foreign ones that are more active in responsible e-commerce (38% vs. 18%). Unfortunately, this opinion is already rarer, although still positive for Poland among Internet users generally (29% vs. 20%).
- Surveyed e-customers increasingly recognize that a greener approach can give Polish e-traders an advantage over foreign sellers (62% vs. 55% a year ago).
- E-commerce trade is considered greener than in stationary stores by 41% of surveyed e-customers, but only 27% of all consumers,
- Respondents' opinions on the above aspects vary widely depending on whether a given consumer buys online, as well as his or her demographic characteristics. It is therefore necessary to communicate pro-social activities in e-commerce to groups of less frequent shoppers, as well as mature people and those living in villages and small towns.

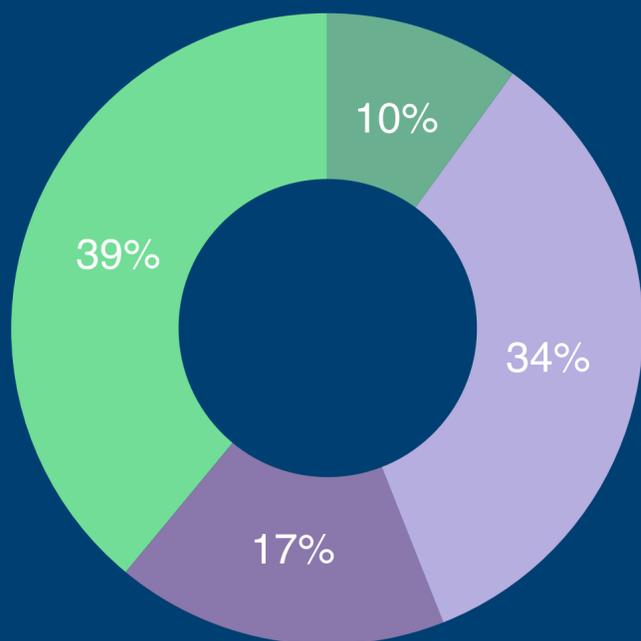
GRAPH 18

To what extent do you think the e-commerce market (...) is socially responsible?  
*E-commerce. Sustainable and Ethical 2022 Report, N=1709, all respondents*  
*E-commerce. Sustainable and Ethical 2021 Report, N=1530, all respondents*



GRAPH 19

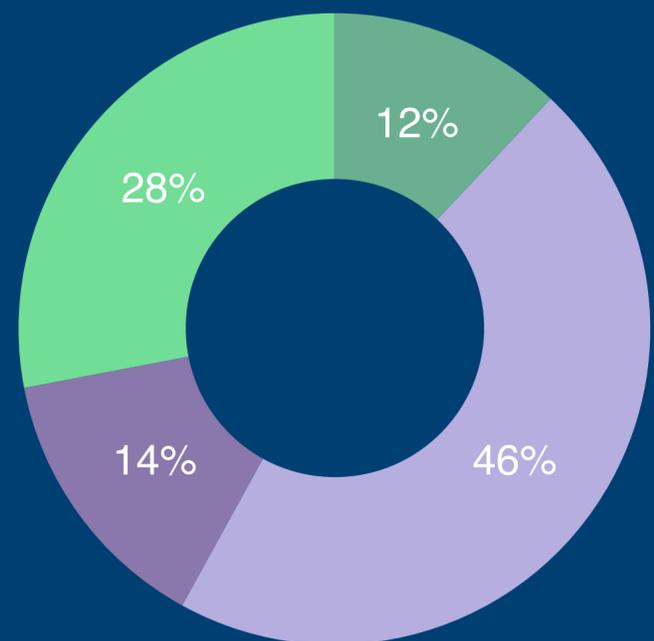
Do you think a greener approach would give Polish e-entrepreneurs an advantage over foreign vendors?  
*E-commerce. Sustainable and Ethical 2021 Report, N=1530, all respondents*



● definitely yes    ● rather no  
 ● definitely no    ● rather yes

GRAPH 20

Do you think a greener approach would give Polish e-entrepreneurs an advantage over foreign vendors?  
*E-commerce. Sustainable and Ethical 2022 Report, N=1709, all respondents*



● definitely yes    ● rather no  
 ● definitely no    ● rather yes

# Dose of data

## E-MARKETS IN CUSTOMERS' EYES

4,08

on a scale of 1-6 is the rating of social responsibility of the Polish e-commerce market in the eyes of e-buyers. In the area of ecology and caring for the environment, on the other hand, the Polish e-commerce market received a rating of 3.74, and this is lower than a year ago (3.81).

48%

e-customers buying 5 or more times a month are of the opinion that it is Polish e-shops that are acting more resiliently in terms of the answered development. Unfortunately, among all Internet users, despite a slight advantage in indicating Polish e-commerce (29% vs. 20%), as many as 51% have no opinion and could not make a judgment.

62%

of the surveyed e-customers believe that active green measures and their communication can give Polish e-stores an advantage over their counterparts from abroad.

## ECO ONLINE OR OFFLINE?

Unfortunately, consumers doubt that e-commerce is more environmentally friendly than traditional, stationary stores. Only 26% of respondents hold this view, although 41% of e-buyers already do.

# Methodology

▶ Report is based on a survey conducted by the Mobile Institute on behalf of the Chamber of Digital economy. The survey was conducted in September and October 2022, using the CAWI (Computer-Assisted Web Interview) method - responsive electronic forms broadcasted on websites and via email.

The survey used the opinie.mobi survey system and instapps.io widgets. Responses were collected from 1709 Internet users and 53 representatives of e-commerce companies. Only complete fully completed forms were taken into account.

In the survey and report, by generation representatives we mean:



## Z GENERATION

People born after 1996 year



## YOUNG MILLENNIALS

People born between 1990 and 1995 years



## OLD MILLENNIALS

People born between 1984 and 1989 years



## XENNIALS

People born between 1975 and 1983 years



## X GENERATION

People born between 1965 and 1974 years



## SILVER POWER

People born between 1946 and 1964 years

# Thank you!

RAPORT AUTHOR



CHAMBER OF DIGITAL ECONOMY

RESEARCH AND ANALYSIS



Mobile Institute

GENERAL PARTNERS

**allegro**

**MODIVO** SA