

e-Chamber Report

e-Commerce Animal-friendly Business

ABSTRACT



REPORT AUTHOR AND PUBLISHER



RESEARCH AND ANALYSIS



Dear Readers,

The Chamber of Digital Economy has been a pet-friendly organisation for many years. Our employees can come into the office with their charges and work. We treat them almost like members of the team - our chamber family. Why? Because we see that this has a significant impact not only on the efficiency of the people employed, but also on their job satisfaction, and this is the key to great execution of often very demanding projects. We also love working with the animal members of our Organisation. The photos you will see in the report are of the pets of our employees and animal-friendly affiliated companies.

The Chamber of Digital Economy is also active in the field of CSR. The e-Isba Report Project: e-Commerce Animal-Friendly business is one of these projects. Together with the Mobile Institute, we decided to check what attitude to animals other entities operating on the e-commerce market have, but not only. We also took the Ho Re-Ca category under the magnifying glass, which raises a lot of eyebrows when it comes to animal adoption and policies. We surveyed more than 1,100 internet users, current, past and future pet owners. We also asked business representatives for their opinion, 60 managers shared their opinion and experiences when it comes to being animal-friendly.

In the report, you will not only find information on how many homes have pets and how Poles treat them, where they shop for them and how they spend their free time with them, but also whether we live in a pet-friendly environment and work in pet-friendly companies. When it comes to the workplace, we show both the employee's and the employer's perspective to give you a full picture of the benefits and challenges of allowing pets 'on your doorstep'.

We also examined and discuss the digital shopping experience for pet products and services. For it turns out that almost every carer enjoys the benefits of e-commerce, but it is a very demanding and analytical customer.

I wish you an enjoyable read. I also look forward to your comments, questions and suggestions on what to expand the survey with in the 2024 edition.



Patrycja Sass-Staniszevska

President
Chamber of Digital Economy

What barks in the grass?

Key results

01

Land of the Animal Fans

One in three households has or used to have a pet, and 43% of internet users surveyed are currently considering buying or adopting a pet in the near future. Poles are also keen to help animals, with 8 in 10 respondents declaring that they help animals in need. Even those who do not have pets help - 61% do so.

02

Shopping awareness

Caregivers buying for their pets are conscious of what they buy. They check not only the price, but also the quality of the products, the composition and are often guided by the opinions of relatives. **All purchases are carefully selected according to the pet's needs.**

03

E-commerce - a place for pets

On the web and social media, we like to share photos and videos of our pets, as well as read a variety of advice. But that is not all. **As many as 85% of the pet owners surveyed buy products for their pets on e-commerce,** with one in five pet guardians doing so very frequently.

04

Working with animals

Working in an animal-friendly office improves the sheer comfort of the workplace, and pet owners believe that pets make them more efficient. Whether an employer is or is not pet-friendly is irrelevant to only 22% of respondents.

05

Time off with your pet

As many as 52% of pet guardians say that when they go somewhere during their free time, such as a restaurant, outing, weekend, park, they always try to make sure that they can take their pet to that place.

06

Trips together

When travelling, the biggest unpleasantness for almost one in three respondents is fines or penalties for carrying animals in uncovered carriers on intercity trains. **As many as 59% of pet owners have experienced unpleasant situations when travelling with their pets.**

The land of animal fans

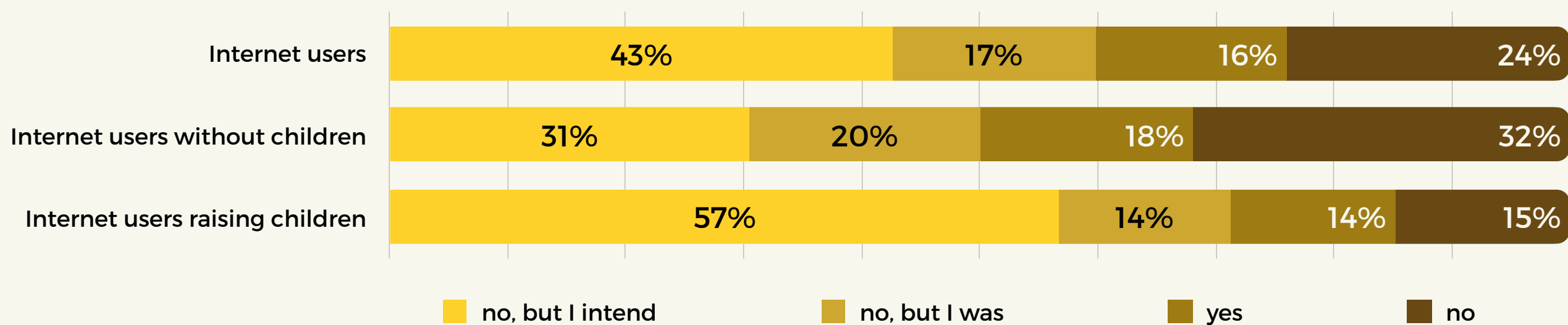
How many homes and on what terms do the animals live in?



Poles are animal-lovers

One in three households has or used to have a pet, and 43% of internet users surveyed are currently considering buying or adopting a pet in the near future. This is a huge group of pet-loving consumers in Poland. When the results are analysed, it turns out that people without children are more likely to have or have had a pet (38%). On the other hand, it is worth mentioning that as many as 57% of people with children are thinking about having a pet.

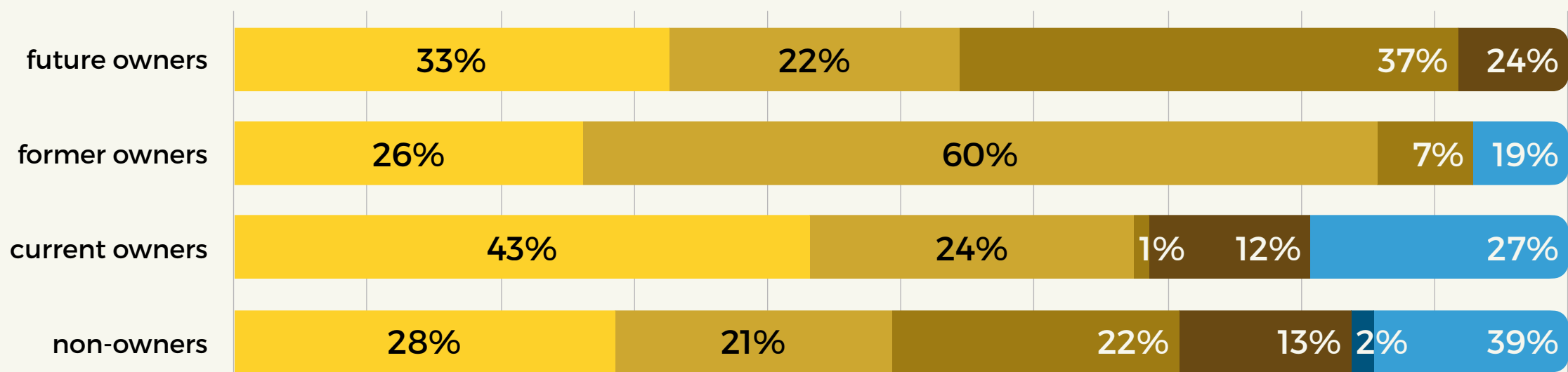
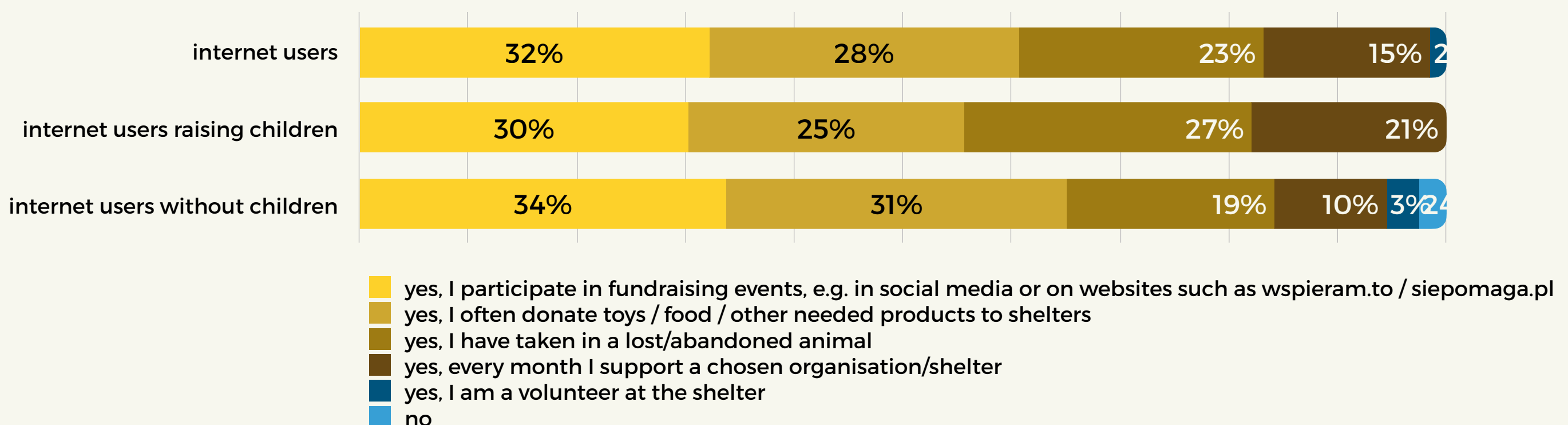
Chart 1: Are you the owner/guardian of an animal?



Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=1179, all Internet users surveyed

Poles help their pets willingly and often. As many as 8 in 10 respondents declare that they help animals in need in addition to caring for their pets. Most of us help by donating toys, food and participating in various collections for animals in need, but as many as 23% have adopted a pet. 2% of respondents declare that they volunteer at shelters. Pet supporters are not only found among pet owners. 61% of people who do not have pets nevertheless help in various ways.

Chart 2: Do you care for animals in need, e.g. do you financially support a shelter?

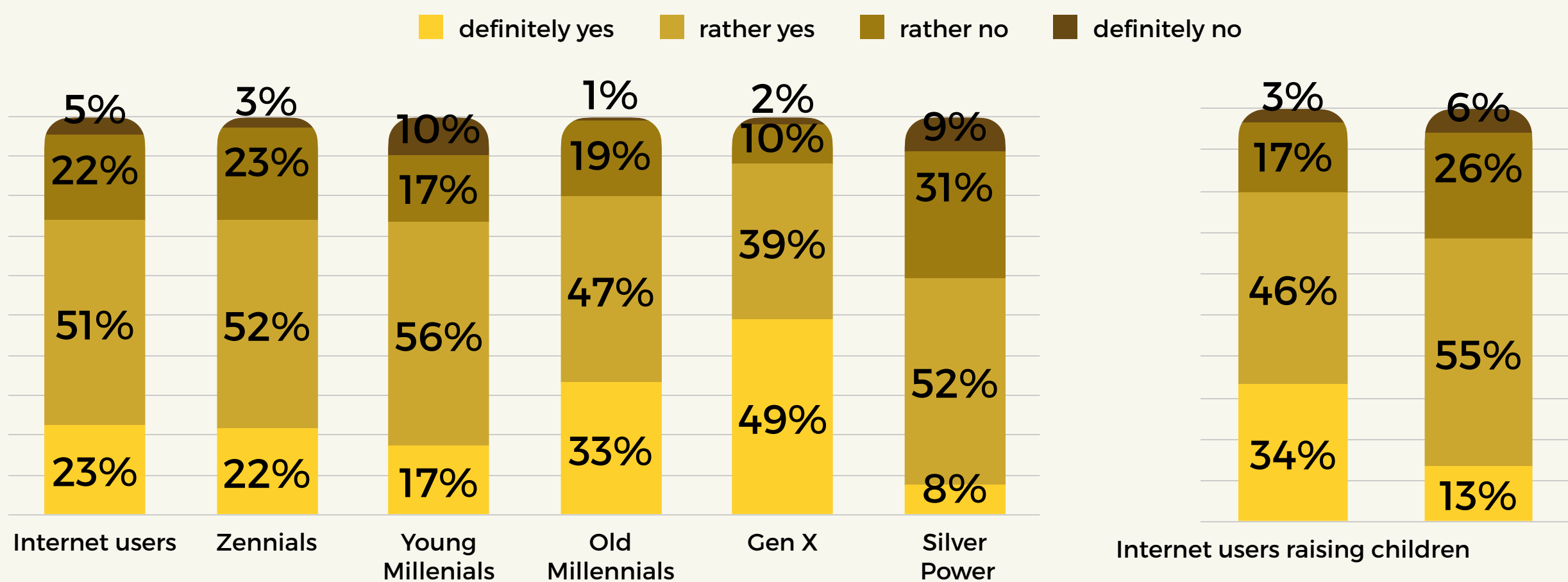


Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=1179, all Internet users surveyed

A pet will tell ... - better health

Animals definitely have a positive impact on our health, both mentally and physically. As many as 74% of internet users think so. For men and women, there is not too much difference in the perception of the impact of animals on our health, but looking at the generations gives interesting results. It turns out that it is generation X that most often appreciates the benefits of pet ownership. As many as 88% of the 'iks' believe that humans live in better health thanks to animals. In addition to the differences in generations, it also turns out that those who are parents are more likely to indicate the positive impact of a pet on their environment (80% vs 69%).

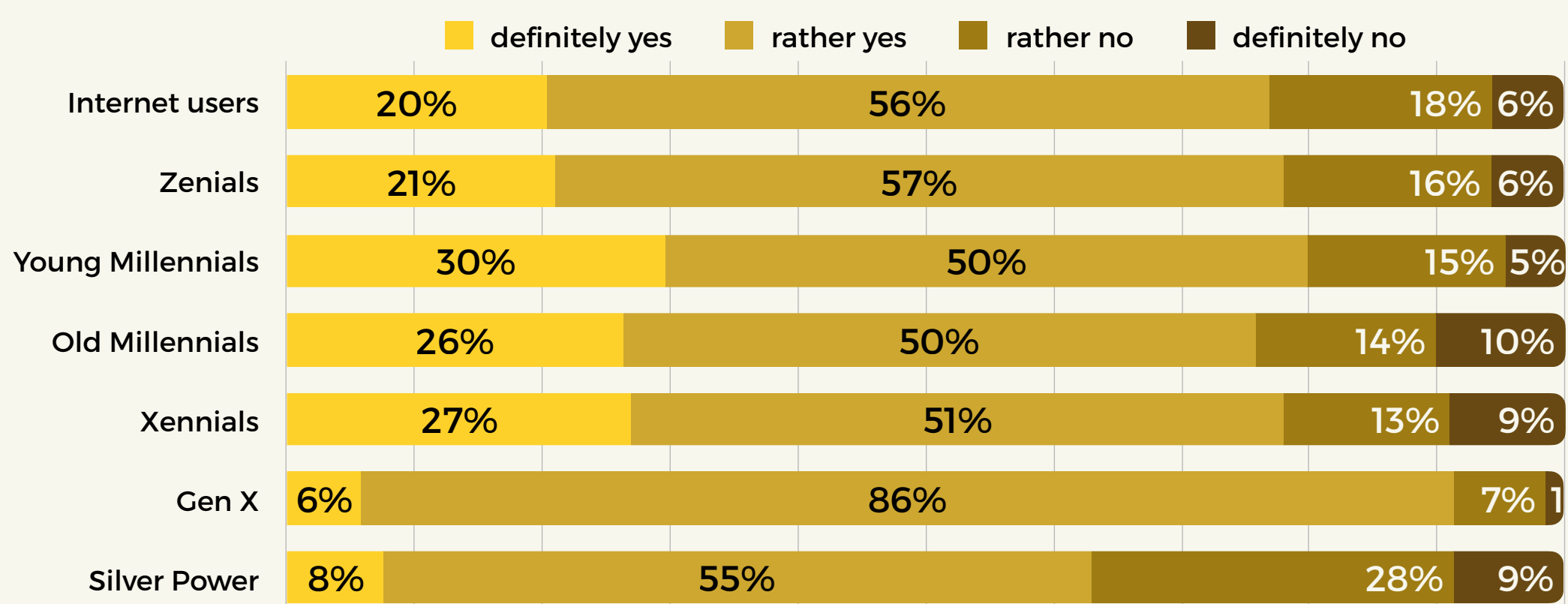
Chart 3: Do you think animals have a positive impact on your health, physical and mental, e.g. improve your mood, support an active lifestyle, improve your fitness, etc.?



Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=1179, all Internet users surveyed

In addition to the benefits in terms of good mental and physical health, it turns out that we are both more sensitive and generally better off thanks to our lesser brothers. More than **three-quarters of those surveyed believe this**. Interestingly, **according to as many as 92% of Generation X people, animals influence the kind of people we are**. These results indicate that it really is important to have pets. It is possible that we do not yet know the other benefits of pet ownership.

Chart 4: Do you think that having an animal makes us as people more sensitive, better?



Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=1179, all Internet users surveyed



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STUDIO

Shopping for pupils

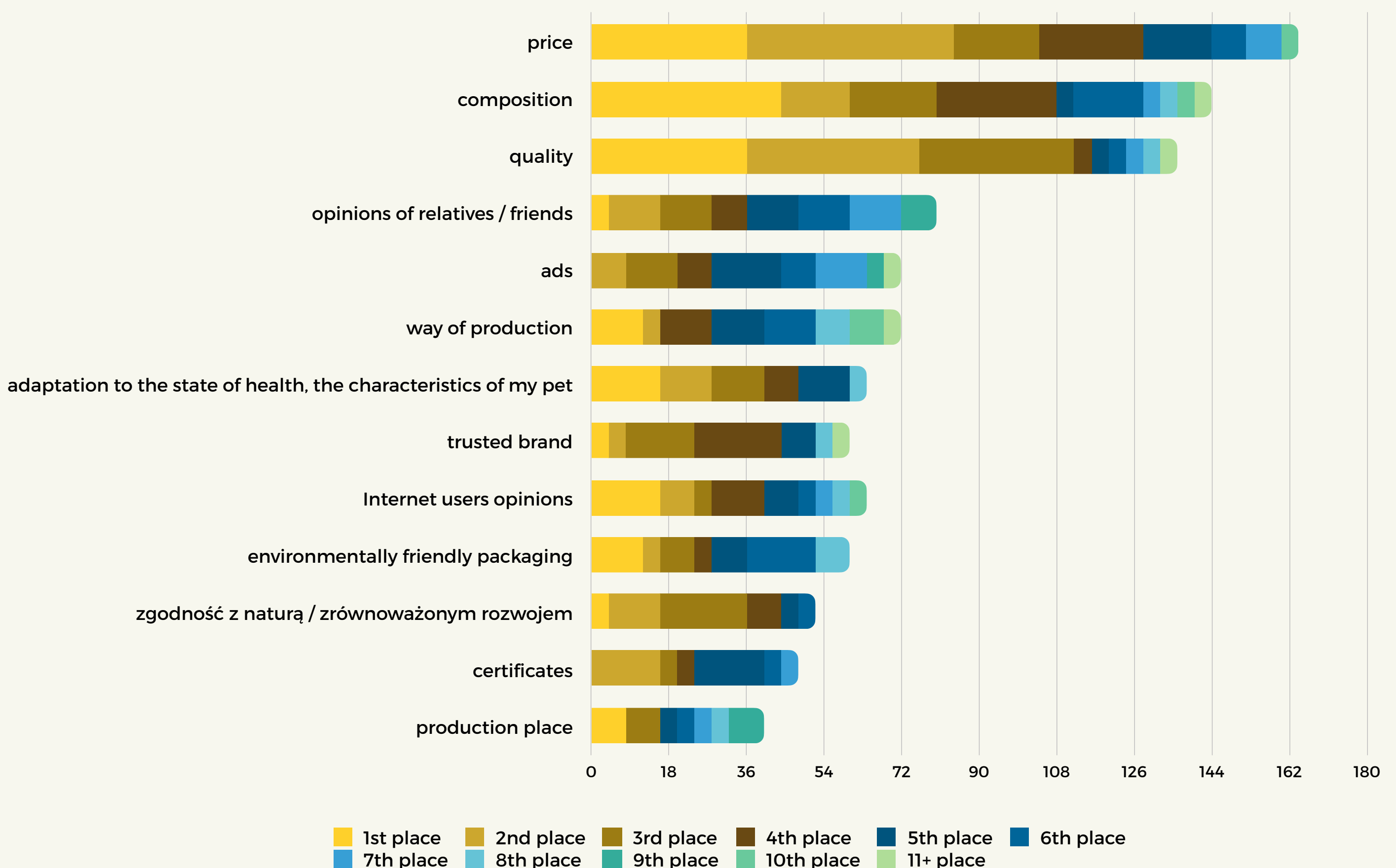
How and where do we buy animal products and services?



If you shop, shop smart

Pet buyers are conscious of what they buy. They check not only the price, but also the quality of the products, their composition and are very often guided by the opinions of relatives. Matching the pet's needs, health or habits was also high among the purchasing factors. E-consumers also pay attention to environmental friendliness, the naturalness of products and certificates. And they do so just as often as they do for purchases in the Beauty and dedicated children's categories, which is more often than in the other categories.

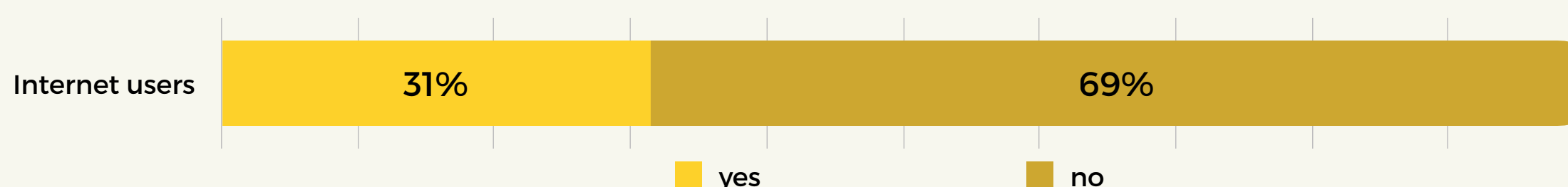
Chart 5: What guides you when choosing pet products online?



Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=228, Internet users owning a pet

And would internet users like to be able to buy wild animals on e-commerce? It turns out that almost one in three would like to be able to do so, and if we look at the generations, **more than half of Old Millennials (54%) would like to be able to purchase something on e-commerce of an exotic pet.** This is +6p.p more than even younger zenials. Only Silver Power has doubts about this. 15% of people from this generation voted for this option.

Chart 6: Should e-commerce expand to include the possibility to buy for wildlife such as birds, big cats, bears etc.?
with all necessary standards, regulations etc. taken into account?



Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=1179, all Internet users surveyed

Animal-friendly trends

01 Ideal match

It turns out that Internet users would have liked to have had the option for paw / muzzle sizing for pet products, as there is on [esize.me](https://www.esize.me).

02 Opt for eco

Brands should pay attention to eco solutions and pro-eco investments. Animal lovers are particularly mindful of this.

03 E-veterinarian

Internet users also expect to see an increase in the range of animal services and professionals online.

04 I want to know

Internet users also expect to see increased education of people about animals.

05 Protection

Internet users surveyed, point to increased penalties for animal abusers as a trend

06 Assortment

Internet users would like to see e-commerce shops (not only pet shops) increase their range for animals in the future.

07 Travelling

Internet users would also like to travel more easily with their pets without restrictions. They would appreciate the option to book pet places online.

08 Without limits

Travelling with pets is an important element as, in addition to innovations, it will be important to remove animal limits on board.

09 (no)Testing

Tested on animals is passe. Internet users would also like to be more able to check whether products have been tested on animals.

Lesser brothers greater at work

Employees' and
employers' approach to
animal companionship



Managers on animals

5,2

Animal-friendly business is a set of activities that make the quality of life of our lesser brothers higher. Acting in accordance with this idea, its proximity to the company where one works, the surveyed managers rated very highly - a five with a small plus..

68%

managers believe that running an animal-friendly company has had a positive impact on the company culture, creating a friendlier.

73%

managers believe that the office and the animal-friendly company in general primarily promotes animal-friendly behaviour and activities of the employees.

a-Benefits

88% of managers believe that there are many benefits to running an animal-friendly company, despite the challenges it faces. These include image, social and even strategic benefits.

Benefits of being animal-friendly

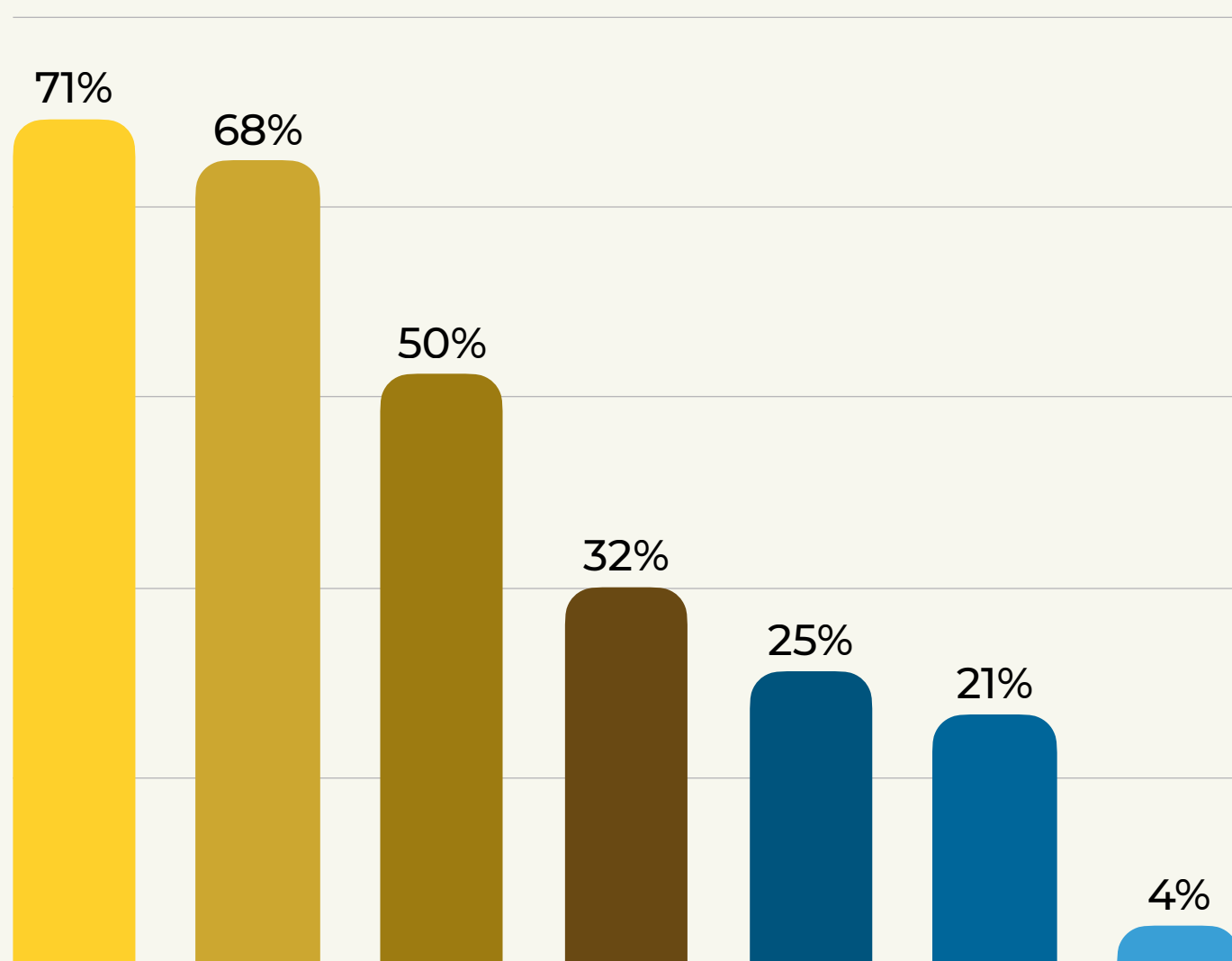
According to managers, being animal-friendly definitely has a positive impact on the running of the business, which benefits in various ways thanks to the presence of animals.(88%). First and foremost are image and social benefits (71% and 68% of indications respectively). In third place were benefits for employees. And one in five managers also sees strategic benefits. This gives an average of 3 different areas indicated by each manager surveyed.

Chart 7: Does the company benefit from doing business in a pet-friendly way?



Source: e-Chamber report, e-Commerce Animal-friendly Business 2023, N=60, all managers surveyed

Chart 8: What areas do these benefits relate to?



- reputational benefits
- social environment benefits
- benefits for employees
- environmental benefits
- economic benefits
- strategic / brand development benefits
- other

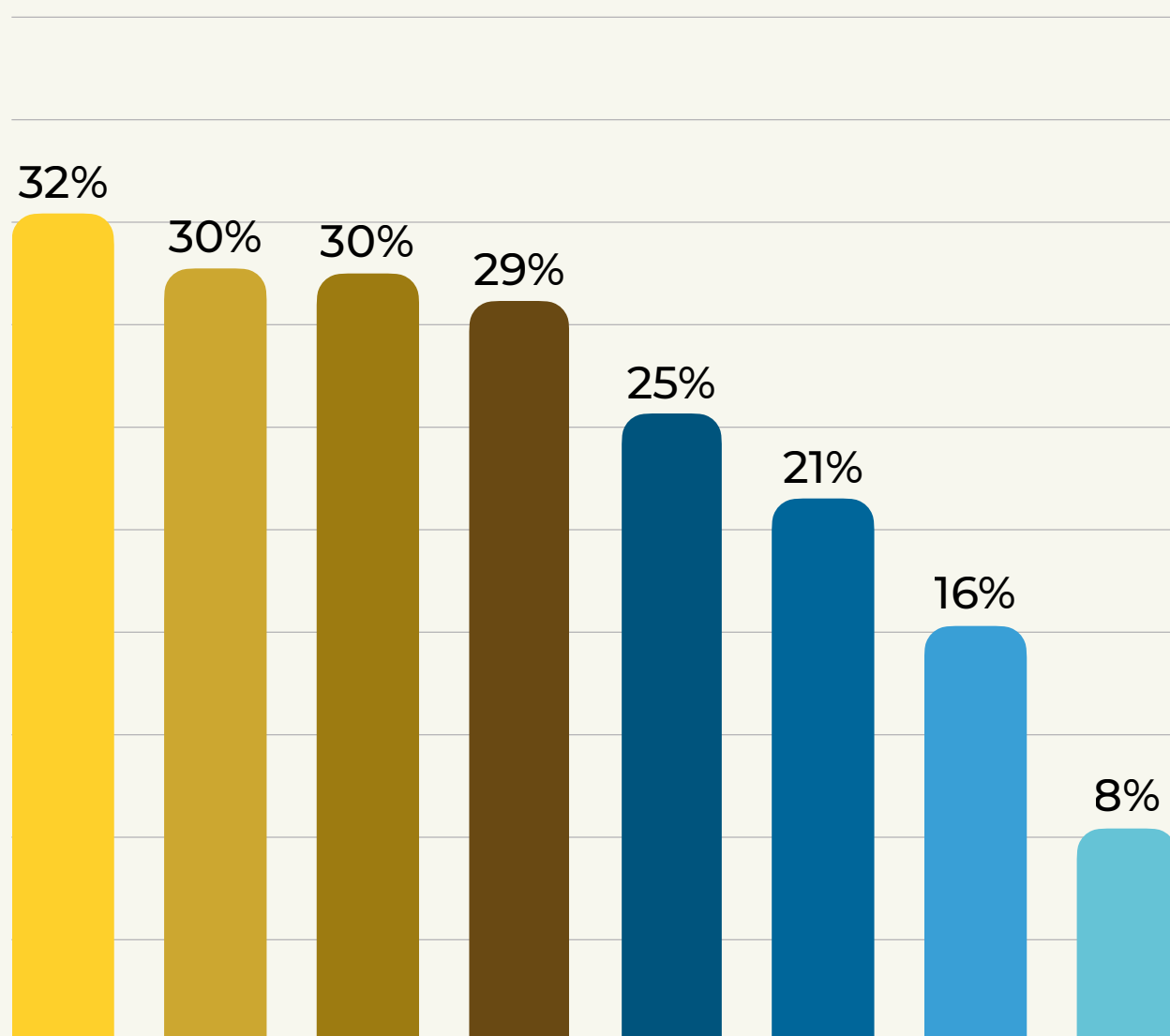
Source: e-Chamber report, e-Commerce Animal-friendly Business 2023, N=56, all managers that see benefits

Business owners and those in management positions are most aware of the benefits. They indicate an average of 4 areas and no one indicates a lack of them.

How does an animal-friendly office work?

According to the Internet users surveyed, a company is more pet-friendly if, above all, pets can be brought into its offices and worked with, if it provides watering holes on its premises and if its surroundings are conducive to walking. Unfortunately, the data show that **23% of companies do not have any facilities for animals**. This is a pity, as more than half of Poles confirm that a positive attitude towards animals makes a company more competitive, with 73% among pet owners.

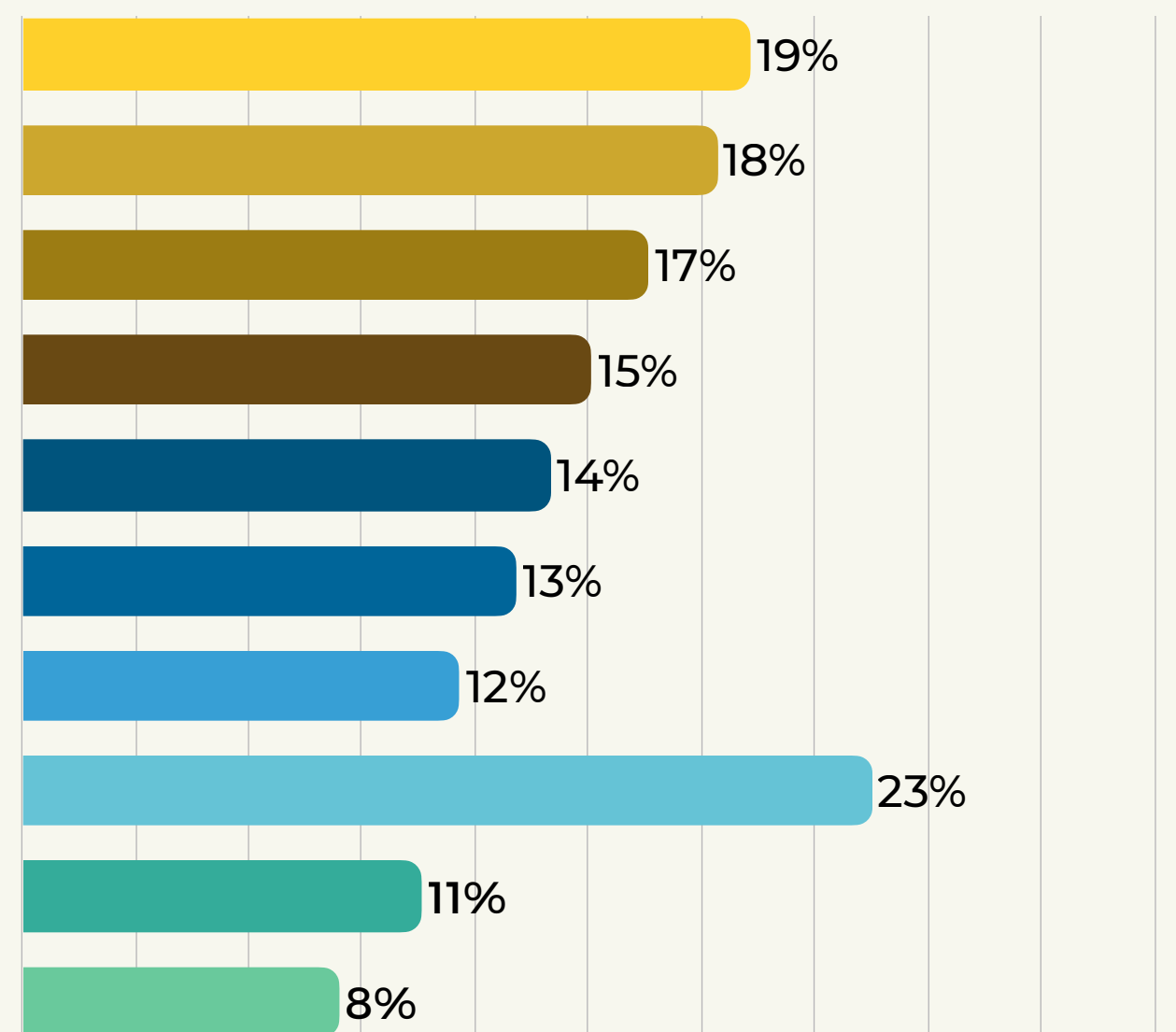
Chart 9: What animal facilities do you think make the office/company more animal-friendly?



- water bowls for animals in and out of the office
- possibility to bring animals to the workplace
- an office environment conducive to animal walks
- the site is safe for animals
- office staff feel that their animals are cared for
- special playrooms for animals
- events organised for animal lovers
- none of the above

Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=1179, all Internet users surveyed

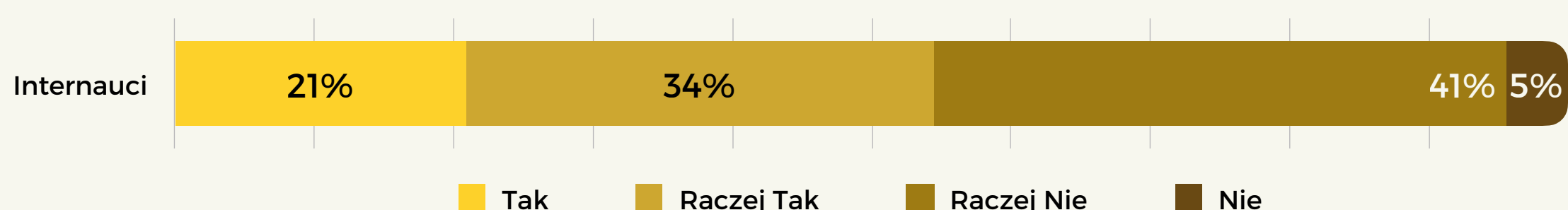
Chart 10: And which of the listed animal facilities are available where you work?



- possibility to bring animals to the workplace
- water bowls for animals in and out of the office
- an office environment conducive to animal walks
- organised events for animal lovers
- office staff feel that their animals are cared for
- special playrooms for animals
- the site is safe for animals
- none of the above
- not applicable, I work from home / am self-employed
- none yet, but the company plans to be more animal-friendly

Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=1179, all Internet users surveyed

Chart 11: Would you describe the place you develop as animal-friendly / pet-friendly?



Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=1179, all Internet users surveyed

RatujemyZwierzaki.pl

RatujemyZwierzaki.pl is the largest fundraising portal in Poland for Foundations and Associations that rescue homeless animals.

We have created not only a website, but a space where Donors meet Organisations fighting for animals. This allows us to act on many levels simultaneously. In addition to developing the website and providing substantive and marketing support to Organisations for Animals, we also conduct 1.5% tax collections.

The ability to raise funds to help animals is fundamental to the work of animal welfare organisations, which is why, in addition to fundraising for specific causes, organisations have the opportunity to acquire Virtual Carers and Permanent Helpers. These are functionalities which are currently used by more than 800 Organisations registered on the portal. We are the only portal that provides such broad and comprehensive assistance to Foundations and Associations.

We systematically organise campaigns, such as our competition "Catch Grants for Organisations!"-the only animal aid fund in Poland. There is no institution or programme that would allow you to get funding to help homeless animals. That is why we decided to fill this gap and create an action in which every Foundation and Association can participate. The total amount of grants we provide annually is PLN 600 thousand. With these funds, Organisations can renovate asylums, maintain animals or pay for treatment.

Thanks to the technological possibilities we have, animal lovers from all over the world get involved in helping homeless animals. We use modern technology to spread social action for animals.



Zosia Lamprecht

RatujemyZwierzaki.pl
fundraising officer

Free time with your pet

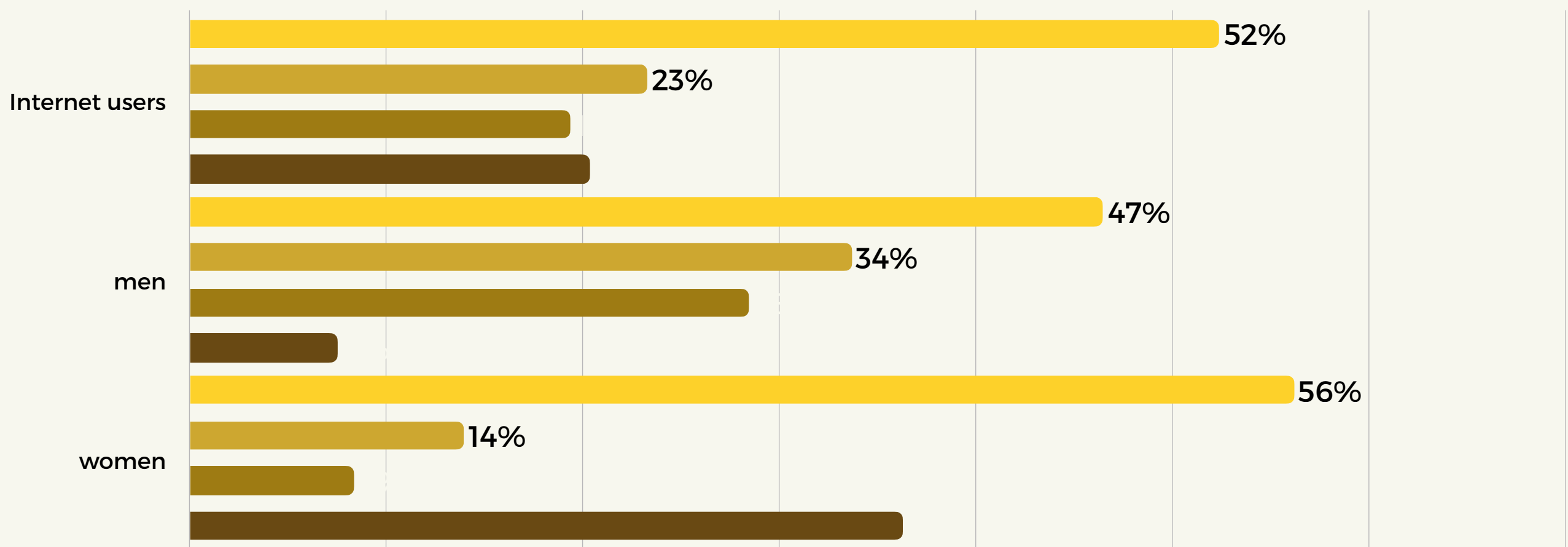
Pets in restaurants, hotels and on holiday



Together on holiday and more

Pet guardians like to spend their leisure time in their company. As many as 52% declare that when they go somewhere during their leisure time, such as to a restaurant, on a trip, at the weekend or to a park, they always try to make it possible to take their pet to that place. 23% avoid places to go where pets are not accepted. 19% always choose places on holiday where it is acceptable to take a pet. This is particularly often done by men. One in three dislikes places that do not accept animals and does not go to such places (28%).

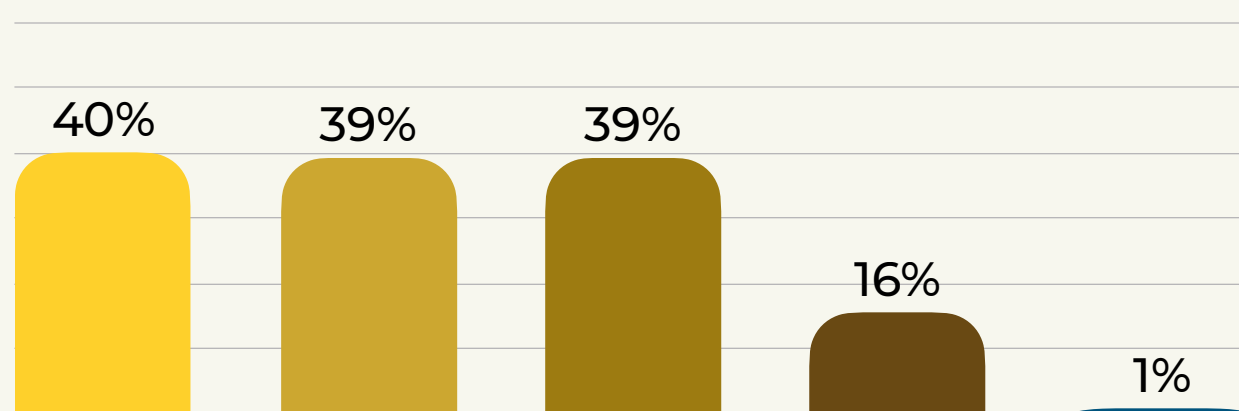
Chart 12: How do you proceed when choosing how/where to spend your free time?



- when I go somewhere during my free time/at the weekend, I always try to choose places where I can take the animals
- do not like and try to avoid places that do not accept the presence of animals
- on holiday I always try to choose places where I can take my pets
- I often find myself leaving my pet at home/hotels/under the care of others, I understand that you can't take it many places

Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=228, internet users with pets

Chart 13: If you do not take your pet with you when you travel, who takes care of it during this time?



- I take the animal to a special animal hotel
- I leave at home and give the keys to friends/family
- I take it to my family/friends
- I return the animal to the breeder from whom I got the pet
- it never happens

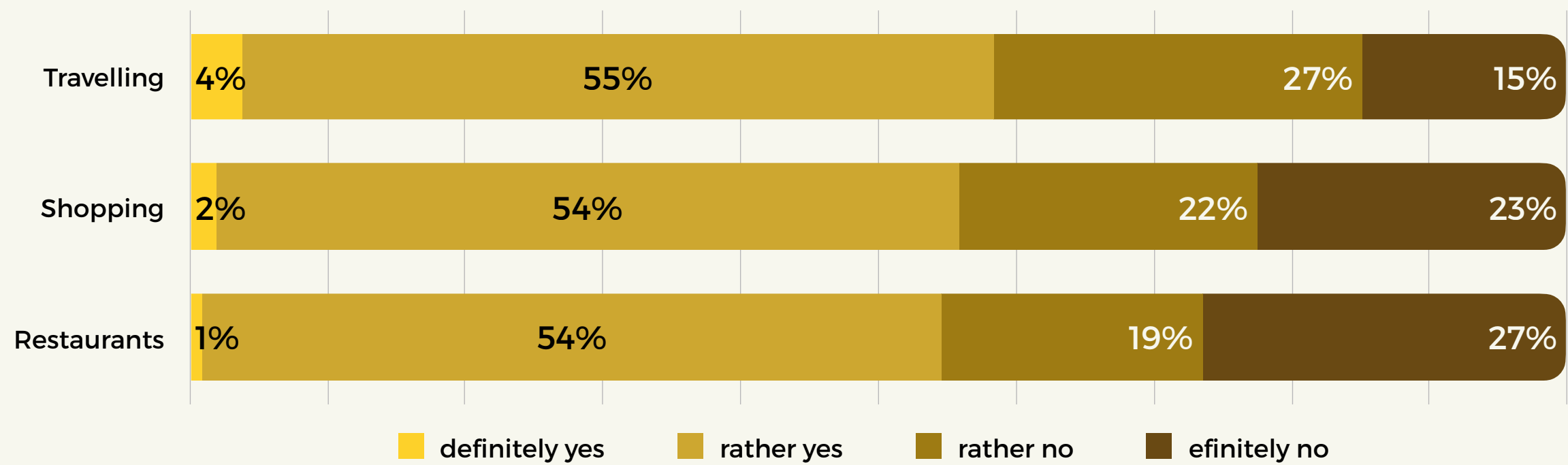
Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=228, internet users with pets

If the pet cannot be taken with them, Poles are most likely to leave it in the care of professionals at a special pet hotel (40%), or entrust it to trusted relatives. They leave the animal at home and give the keys to friends, relatives or take it to a family (39%).

Ho-Re-Ca checked

Having a pet in their care and taking them with them on a trip, but also to a shop or restaurant, more than half of owners experience unpleasant situations. This is 59% of those travelling with a pet, 56% of those shopping and 55% of those with pets in restaurants. These are very large and worrying figures.

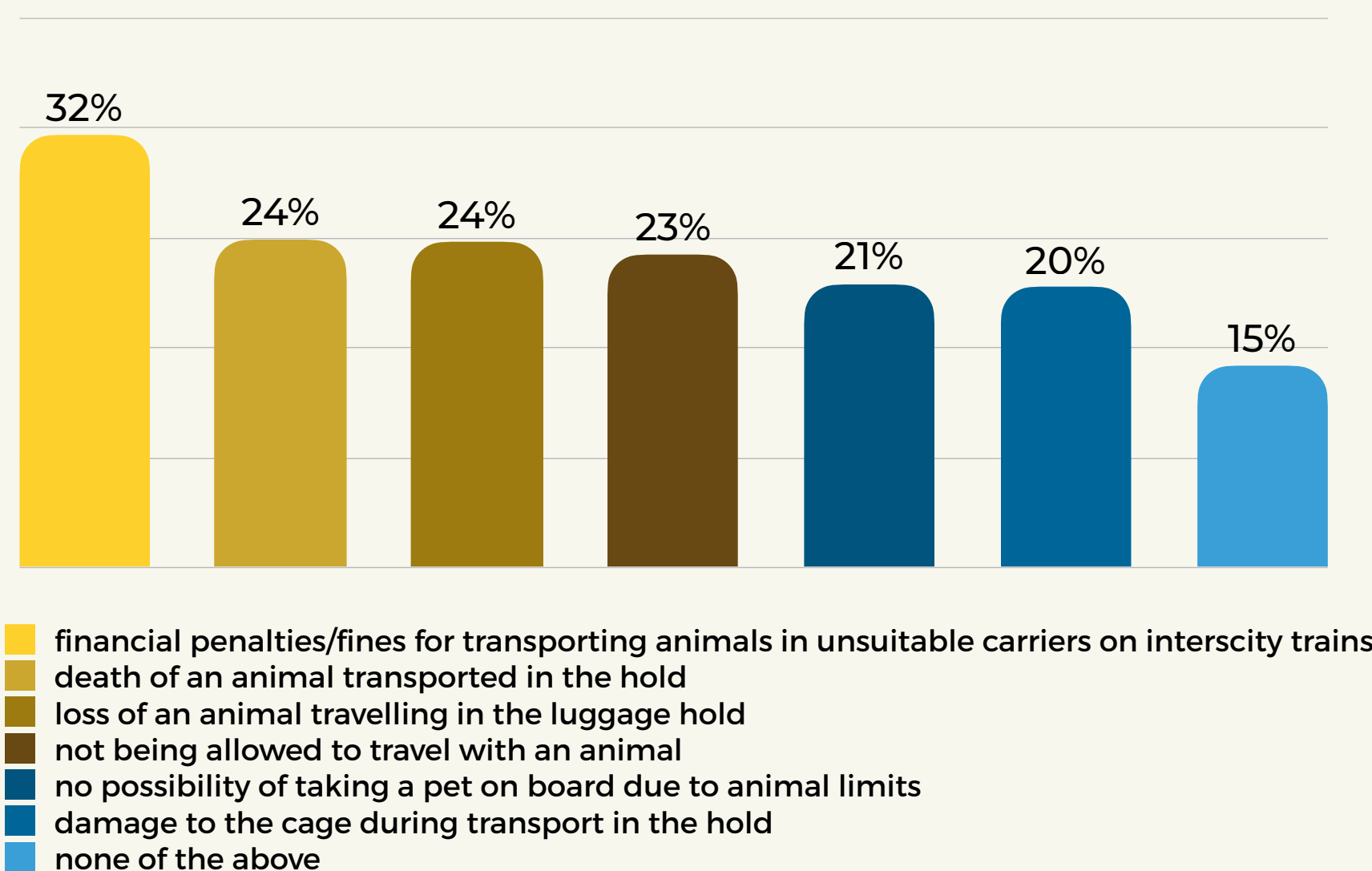
Chart 14: Have you experienced any unpleasant situations when travelling/shopping/attempting to enter a restaurant with your pet?



Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=228, internet users with pets

When travelling, the most unpleasant thing for almost one in three respondents are fines or penalties for transporting animals in uncovered carriers on trains. Almost one in four pet owners fears the death or loss of their pet travelling in the luggage hold. Overall, it is apparent that travelling with a pet brings with it a great deal of uncertainty and 'question marks'. Perhaps this is where clear communication from airlines, airports, means of transport, hotels, motels and countries in general, particularly frequent tourist destinations, regarding their pet policies would be useful.

Chart 15: What unpleasant situations do you think a traveller with animals might encounter?



Source: e-Chamber Report, e-Commerce Animal-friendly Business 2023, N=228, internet users with pets

Animal Helper

Animal Helper is a free and publicly available app that aims to save animals' lives and health. Unfortunately, people do not know where to call when they see an injured, sick, lost or starved animal. The basic idea is to bring animal reports together in one place. Reports go to a central control room, which acts like a dispatch centre and accepts them 24/7. Our coordinators then notify the appropriate local law enforcement and emergency services or charity for the case. I would like our app to be a tool to foster a sense of responsibility for these loved creatures, whether they are pets, wildlife or farm animals. Each and every one of them deserves empathy and respect and if I had to give my life for something, it would be this aspect. We are a strange, divided country, but I think we all agree on this and can afford to do some really beautiful, empathetic acts. And it's time to finally prove it to these poor animals.



Adam Van Bendler

founder of the Psia Krew
Foundation and initiator of the
Animal Helper app

What should an animal-friendly city offer?

1. I'm green

The most important thing for a city to be animal-friendly is the amount of greenery and the variety of walking routes (43%)

2. Trainings

The city should offer access to plenty of dog training, sniffing games or animal training (26%)

3. Fun

Specially adapted places for animals to play, e.g. dog fields, are important (19%) or races are organised, shared walks in parks (18%).

4. Classes

It is important that special training classes (17%) are available, such as: nosework, frisbee, agility, obedience, IPO, herding

5. Freedom

It is good when, on housing estates, animals are allowed to roam freely on lawns if they are cleaned up (16%)

6. Caring

Expectations that the number of veterinary surgeries and well-stocked shops in the area is sufficient (14%)

7. No bans

It is also important that there is no ban on letting animals loose on lawns / in parks if you clean up after them (12%)

8. Animal-friendly

It is also important that cafes/shops/restaurants are pet-friendly (12%)

9. City walks

Animal lovers also expect the agglomeration to be suitable for animal walks (8%)

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SZUKASZ WIERNEGO PRZYJACIELA? ADOPTUJ GO!

Witaj w Fundacji Cane Corso Rescue Poland! Nasza misja to ratowanie i znajdowanie nowych, kochających domów dla psów Cane Corso w potrzebie. Dołącz do nas i zyskaj wiernego przyjaciela!

DLACZEGO WARTO?



Inteligentne
stworzenia



Wielkie
serce



Oddany
towarzysz

JAK MOŻESZ POMÓC?



Adopcja: Przygarnij psiaka!



Wolontariat: Dołącz do naszego zespołu.



Darowizny: Wesprzyj nas finansowo.

Każda złotówka pomaga naszym
czworonożnym podopiecznym.

Fundacja Cane Corso Rescue Poland
ul. Ludwika Waryńskiego 12/14 m 46, Łódź
KRS: 0000592118
REGON: 363271806



Shelters list

Nazwa	Adres
Adoption Centre ADA	Przemyśl, Zamoyskiego 15
Animal shelter „Ciapkowo”	Gdynia, Małokacka 3A
Animal shelter in Zielona Góra	Zielona Góra, Szwajcarska 4
Animal shelter „Azyl”	Dzierżanów, Brzegowa 151
Animal shelter "Na Paluchu"	Warszawa, Paluch 2
Animal shelter in Łódź	Łódź, Marmurowa 4
Cracow Society for the Care of Animals	Kraków, Rybna 3
Animal Shelter in Poznań	Poznań, Kobylepole 51
Shelter for Homeless Animals in Wrocław	Wrocław, Ślázowa 2
Association Przystanek PsyKoty	Cichów, Cichów 61
Dog Friendly Płock Association	Płock, Adama Mickiewicza 23/166
Volunteer of Shelter for Dogs in Nowodwór	Lublin, Leszczyńskiego 23
Shelter for Homeless Animals in Rybnik	Rybnik, Majątkowa 42
Shelter „Promyk”	Gdańsk, Przyrodników 14

Methodology



Who did we survey and why?

The report is based on a study conducted by the Mobile Institute on behalf of the Chamber of Electronic Economy. The survey was conducted in October 2023 with the use of the CAWI method (Computer-Assisted Web Interview) - responsive electronic surveys emitted on websites and by email.

The survey used the opinie.mobi survey system and instapps.io widgets. Responses were collected from 1,179 Internet users and 60 company representatives from various categories, including the Ho-Re-Ca industry, a key industry in terms of attitudes towards animals. Only fully completed surveys were taken into account.

In the survey and report, by representatives of generations we mean:



Z Generation

persons born
after 1996



Young Millennials

persons born between
1990 and 1995



Old Millennials

persons born between
1984-1989



Xennials

persons born
between 1975-1983



X Generation

persons born between
1965-1974



Silver Power

persons born between
1946-1964

Thanks

The report featured Thor, Loki, Churchill, Tyson, Fibo, Pepe, Dot, Kratos, Vena, Opposite, Maciek, Caramel, Sheldon and Spencer. We would like to take this opportunity to thank the wonderful pets and their keepers: Patrycja Sass-Staniszevska, Anastasia Buryanova, Dorota Bachman, Magdalena Grablewska, Justyna Babicz, Roksana Olejniczak, Angelina Nguyen, Katarzyna Myszkowska, Agata Kordas, Sylwia Brulińska, Ewa Morawek, Sebastian Błaszkiwicz for the joint session and the possibility to use the photos. Thanks to the photographers: Animal Foto Studio Kamil Czyżewski and Marta Jaskólska.



Thor

Patrycja Sass-Staniszevska



Loki

Patrycja Sass-Staniszevska



Churchill

Anastazja Buryanova



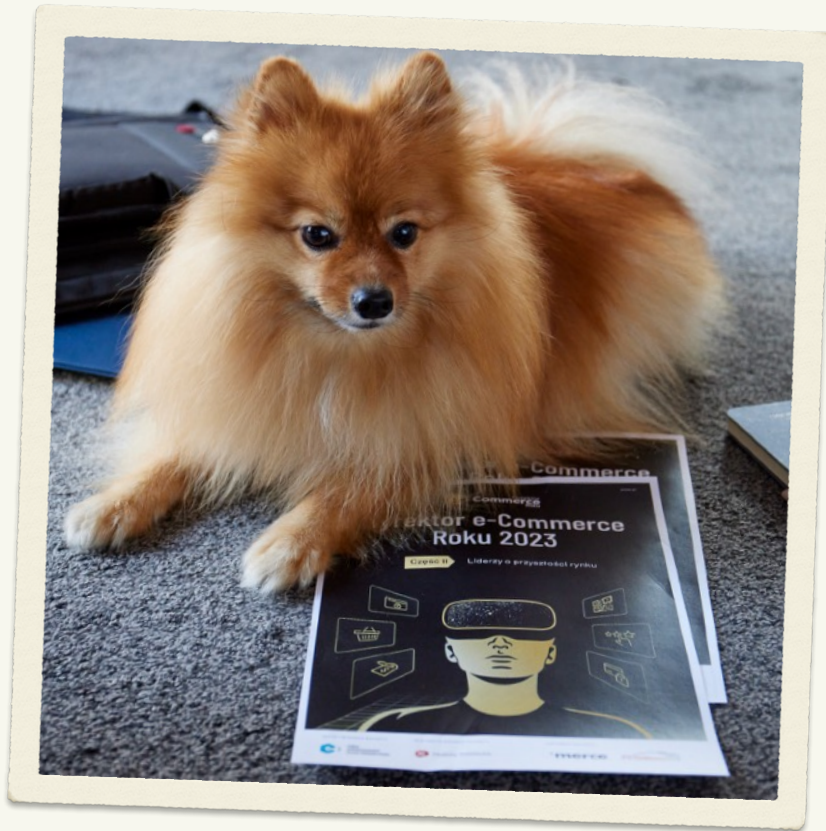
Darth Vader, Bardolino & Hera

Sebastian Błaszkiwicz



Fibo

Justyna Babicz



Pepe

Roksana Olejniczak



Kropka

Angelina Nguyen



Tyson

Dorota Bachman



Przeciónek

Agata Kordas



Kratoos i Wena

Katarzyna Myszkowska



Maciek

Sylwia Brulińska



Sheldon

Magdalena Grablewska



Spencer

Magdalena Grablewska



Karmel

Ewa Morawek

Thank you!



AUTHOR AND PUBLISHER



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RESEARCH AND ANALYSIS



Mobile Institute