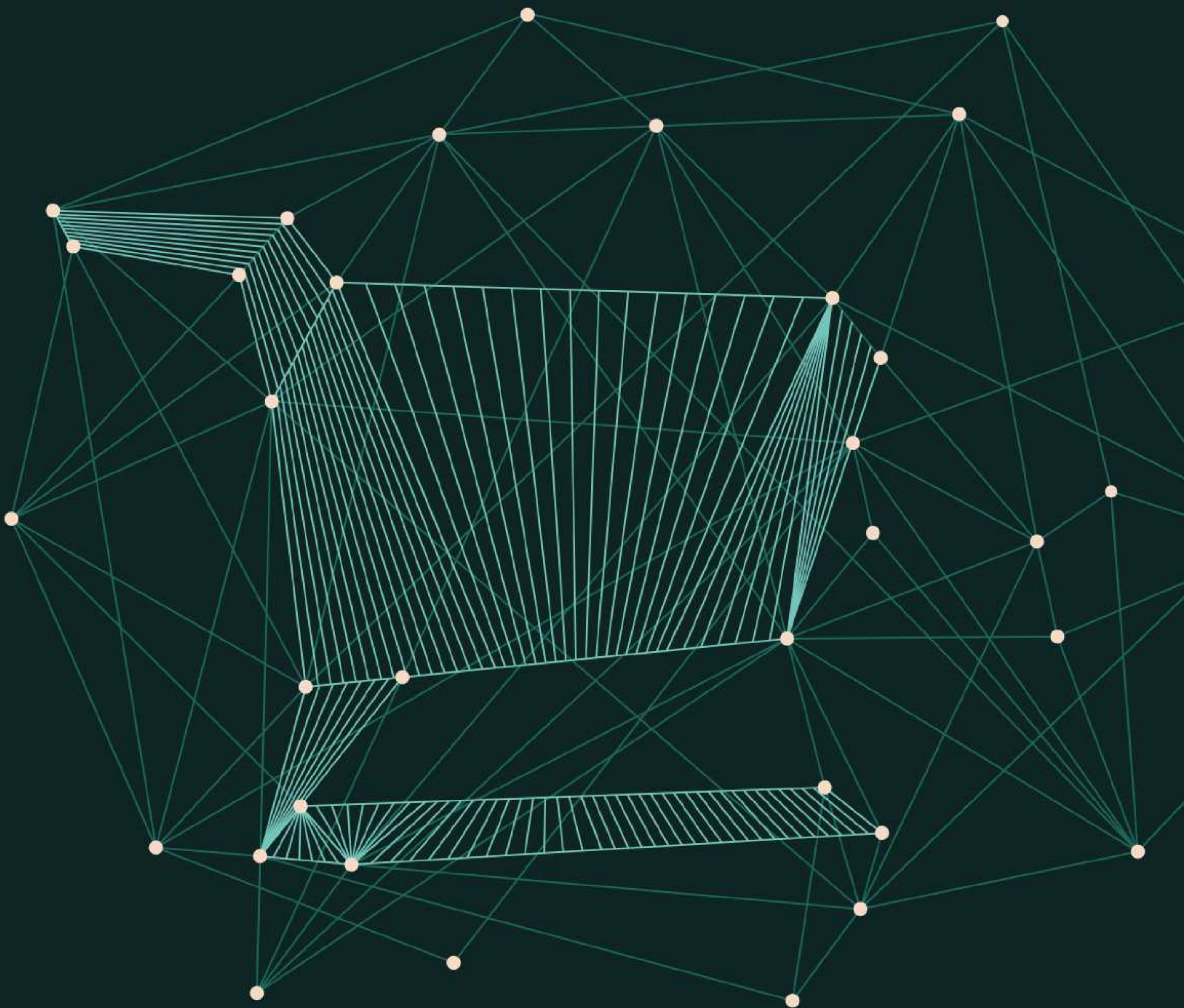


# SUSTAINABLE E-COMMERCE

CHAMBER OF DIGITAL  
ECONOMY REPORT | 2024

ABSTRACT



REPORT AUTHOR

RESEARCH AND ANALYSIS

CONTENT PARTNER



# Introduction

## ► „Sustainable e-Commerce” at your fingertips

E-commerce is a vital part of the global, European and Polish economy. Vendors are increasing their online presence using reliable digital technology mechanisms. Today, under the influence of market trends, legal obligations, institutional incentives and competitor pressure, the trend of facilitating more sustainable options for e-commerce customers and clients is consolidating.

This is what our report is about. We surveyed consumer behavior regarding responsible development and the practices of companies selling online. We touched on the most important issues related to them. We included comments on the results, thoughts and experiences of e-business leaders. We realize that effective support of companies' activities in this area depends primarily on the level of knowledge of organizations, the involvement of institutions and the practices of consumers themselves. Knowing where we are allows us to assess the development, address the biggest problems and take action in the designated areas.

In addition to the constant comparative palette of data, this year we have also included new issues in the report, i.e.: recommerce, minimalism, i.e. thoughtful shopping, refillers, localism, eco-persons, accessibility, digital sustainability, cybersecurity and so-called dark patterns. All this to give companies a tool for improvement, market experts an insight into the current state of the market, and interested shoppers a mirror image - in numbers and indicators - of their own behavior.

The Chamber of Digital Economy supports the development of digital business through the formation of national legislation. It supports market education and industry integration. We have a huge contribution to the development of e-commerce, creating a modern agora of Polish e-commerce - a meeting place for people, companies, organizations and institutions that together create this ecosystem.

We reward the best solutions, products and stores by organizing events and competitions, ie: e-Commerce Polska Awards, E-commerce Director of the Year, Performance Marketing Diamonds, Digital Quality Mark. We also conduct business training and thematic groups, as well as customer education on the market. In addition, we publish annually a series of reports that form a complementary whole - a picture of e-commerce in Poland. The report we give you is part of these activities. We believe that it will allow you to gain a deeper understanding of the market and further professionalize your business.

We invite you to cooperate with us in the area of sustainable development and other activities for the development of the industry.



**Patrycja Sass-Staniszevska**

CEO  
CHAMBER OF DIGITAL ECONOMY



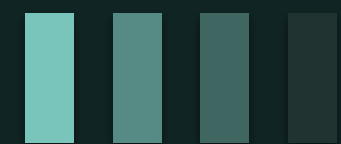
**Paweł Oksanowicz**

HEAD OF RESPONSIBLE E-COMMERCE / ESG  
THINK TANK AT CHAMBER OF DIGITAL  
ECONOMY

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THIS IS AN ABBREVIATED VERSION OF THE REPORT. THE FULL REPORT IS AVAILABLE TO E-CHAMBER MEMBER COMPANIES. BECOME AN E-CHAMBER MEMBER AND RECEIVE ACCESS.



# Key findings

Consumers

▶ 1

## What is sustainable development?

Knowledge of sustainability concepts is unfortunately not growing. What is ethics in e-commerce is now known by 16% of surveyed consumers (-3p.p.). On the other hand, the level of knowledge of what sustainability is in the economy has returned almost to the level of 2022, i.e. knowledge of the concept is declared by 16% of respondents vs. 21% a year ago (a decrease of -5p.p.).

## Entertainment and knowledge go hand in hand

This year, when it comes to sources of SD knowledge, entertainment platforms like Netflix, Spotify, Disney+, and Apple TV saw huge growth. With 18% of indications - a 3-fold increase vs. 2023 - they jumped to 3rd place, right after product packaging and the respondents' workplace.

▶ 2

▶ 3

## Conscious and practical e-choices

When choosing an e-retailer, consumers pay attention primarily to promotions, low prices, assortment, and delivery time and methods, but this year the predominance of price issues (low prices, promotions) is not so clear. Indications of SD-related factors have also increased significantly. For 26% (+11p.p.) of e-customers, the idea behind the brand and product is important. 25% (+6p.p.) pay attention to their certifications and the integrity of their business practices. 24% (+6p.p.) take note of information about the brand's involvement in socially positive actions.

## Pack wisely

The eco-friendly aspect of product packaging is paid attention to by 63% of Internet users. This is +8p.p. more than in 2023. The willingness to pay a surcharge for eco-packaging has also increased this year. It is declared by 40% (+6p.p.) of respondents. If consumers were already to pay a surcharge, 39% of e-customers might pay from PLN 5-10 or from PLN 3-5. This also implies a greater willingness to spend for this purpose.

▶ 4

▶ 5

## Re-use for the environment's sake

Poles are increasingly buying products in so-called refillable packaging, or refillable packaging. It turns out that a total of 42% of e-buyers use such packaging sometimes or on promotions or when it's not a more expensive option, and 8% buy this way whenever they have the option. One in four Poles like it when an e-shopper reuses packaging instead of using new packaging.

# Key findings

Consumers

▶ 6

## Polish e-commerce more responsible

The Polish e-commerce market as socially responsible received a rating of 4.06 this year (vs. 4.19 in 2023 and 3.89 even a year earlier). We fare better on this score than the EU, non-EU and global markets. Unfortunately, however, there are still more respondents who consider traditional trade (stationary stores) to be greener than e-commerce.

## Again, no return on the issue of returns

Unfortunately, the majority of Internet users still do not consider returns in e-commerce as an activity that has negative consequences for the environment. A year ago, 36% of respondents perceived such a relationship, and today it is even less - 31%. Already consumers are more likely to consider whether to choose and purchase a product that involves distant delivery at all. 41% say they will refrain from buying such goods.

▶ 7

▶ 8

## Shopping security is the clue

More and more respondents (38%, +14p.p.) expect e-commerce to teach online security. This may be due to the fact that as many as 17% of e-buyers have experienced an attempted scam or fraud while e-purchasing or using e-services. 55% of those who experienced such a phenomenon pointed to fake e-mails. In second place were misleading text messages.

## Little trust in e-stores

18% (-4p.p.) of Internet users say they would be willing to report violations to e-shops if they had the ability to do so. Why? As many as 62% (-1p.p. vs. 2023) believe that businesses would not acknowledge their reports and take them into account anyway.

▶ 9

▶ 10

## Engagement problem

Far fewer consumers - 22% (-14p.p.) - are currently engaged in activities or social actions organized by brands, and for most of them these are still sporadic activities (15%). Continuous involvement is declared by 7% of respondents (+5p.p. increase), while 24% (-8p.p.) intend to engage in such activities in the future.

# Key findings

E-business



## Bigger knows more

This year, the concept of responsible e-commerce is known among 34% of all e-businesses surveyed, while 7 in 10 of the largest companies are familiar with it. The same is true of other concepts, such as ethics in e-commerce.

## Responsibility on a larger scale

Acting responsibly towards employees, customers, the environment, suppliers and business partners, so in general all stakeholder groups and the environment is declared by 47%, including as many as 61% with revenues of up to 5 million and 75% of the largest e-commerce companies.



## E-commerce for everyone

One in four e-tailers is taking steps to increase accessibility for people with special needs, and 36% of the largest companies are doing so. Companies that make such changes primarily focus on people with special mobility needs or parents with young children, as well as people with hearing impairments.

## SD is a tangible benefit

Again this year, nearly 9 in 10 of the largest e-businesses see the benefits of conducting e-business in an ethical and responsible manner. Among all 500-plus companies surveyed in this edition, so including a diverse range of industries and smaller entities, the percentage reached 79%.



## The market says “check”

34% of e-tailers check what ESG/SD approach a company takes before doing business with it. Subcontractors are the first to be inspected, followed by suppliers, vendors and manufacturers. 38% of those controlling the largest companies indicated that they analyze all partners. Among all e-tailers, the figure is 13%.

# KNOWLEDGE AND ATTITUDES

∴ CHAMBER OF DIGITAL ECONOMY REPORT | 2024





Ministry  
of Digital Affairs

## Dariusz Standerski

SECRETARY OF STATE, DEPUTY MINISTER  
MINISTRY OF DIGITIZATION

Cyber security is crucial to maintaining the integrity of e-commerce throughout Poland's economic system. E-commerce allows businesses to have broad access to diverse customer groups and markets. Consumers can access a wide range of offers and accurate information about products and services by connecting from almost anywhere. Unfortunately, the growth of online commerce is often accompanied by new types of cyber threats.

Cybercriminals are perfecting techniques ranging from data breaches to phishing schemes and payment fraud. The estimated cost of cybercrime has been rising steadily and is now estimated at more than \$9 trillion a year. This is far more than the cost of implementing cyber security systems in companies. In a reality prone to disruption by individual criminals and organized groups, all companies and institutions should invest in cyber security tools. This means more than installing firewalls and encrypting data. It requires a security strategy, regular risk assessments and incident response plans.

A resilient economy in this aspect is built through cooperation between the e-commerce sector, social partners and the government. Sharing insights, developing good security practices and responding jointly to emerging challenges is certainly a step in the right direction.

Citizens and consumers must be at the center of all efforts. Each and everyone should have a sense of process transparency and data protection when shopping online and handling their daily official business. Every effort should be made to build an ecosystem of trust all the time.



Polish Investment  
& Trade Agency  
PFR Group

## Magdalena Skarżyńska

VICE PRESIDENT OF THE MANAGEMENT BOARD  
POLISH INVESTMENT AND TRADE AGENCY

Expanding a company's operations to include online foreign sales is a responsible task. However, you can minimize the risks involved, for example, with the support of business environment organizations such as the Polish Investment and Trade Agency. For business, we offer our expertise and years of experience in international operations. Our offer has a chance to widely reach e-Isba affiliated companies as a result of our close cooperation resulting from excellent relations built with e-Chamber President - Mrs. Patrycja Sass-Staniszevska. As a partner of e-Chamber in matchmaking events, events organized at Polish embassies located in Europe, we strive to multiply the export success of Polish e-commerce companies by building a dialogue with local partners. Our network - more than 50 PAIH offices - around the world is a huge support for entrepreneurs here. Through such a broad global presence, we can expertly advise Polish exporters about

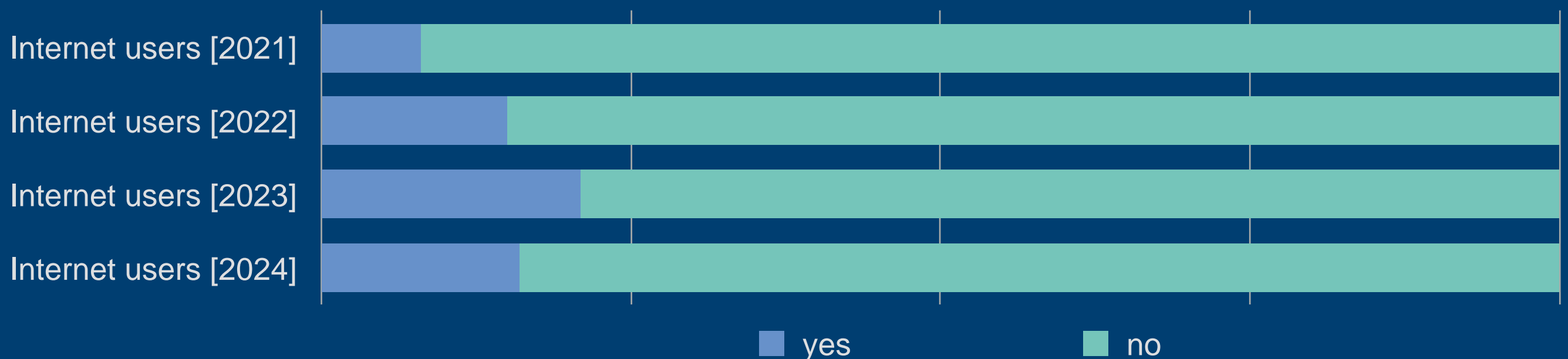
At PAIH, however, we know that a physical presence in a country is not enough. It is digital trade tools that will increasingly influence the effectiveness of the internationalization of Polish companies' operations. Online exports can unlock the enormous potential of e-enterprises, with relatively low initial costs. E-export means access to a broad customer base, diversification of revenues, testing new products in different markets and building brand credibility. Online tools simply make it easier, cheaper and faster than ever to reach international customers. The global marketplace is now at your fingertips.

# Sustainable development in the economy: knowledge of the concept

► This year's e-Chamber survey does not bring positive information regarding consumers' knowledge of socially responsible development. First of all, there is lower awareness of the concept of what sustainable development is in the economy. Only 16% of surveyed Internet users are aware of it, according to their declarations, compared to 21% a year ago, and 15% even a year earlier. That's a drop of -5pc. The drop in awareness is seen primarily among men (-14p.p.), as well as among representatives of the Silver Power generation and Young Millennials. In contrast, Generation Xennials, like residents of large and major cities, continue to show the highest awareness of the concept. As in earlier years, parents are also familiar with the concept. If we look at consumers' preferred buying styles, the concept is best known to bulk shoppers and those who generally like to shop - that is, they buy for pleasure, as well as to shop consciously, that is, based on an analysis of the composition and information about the product's origin and production.

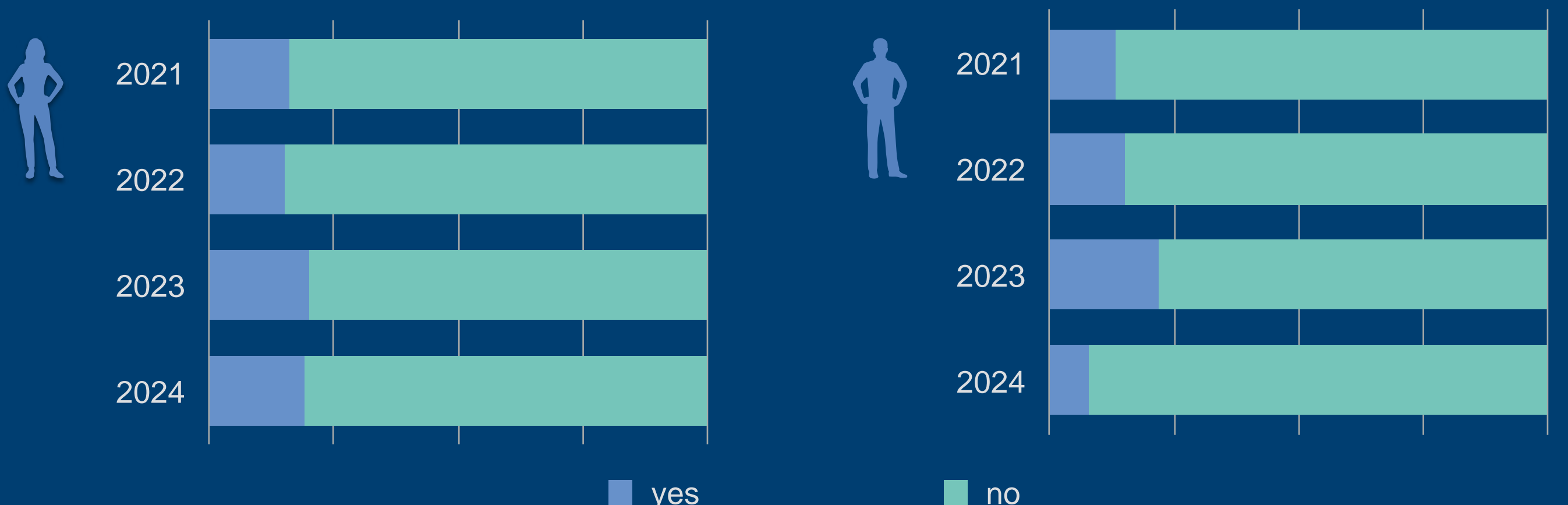
**GRAPH 1**

Do you know what the concept of economic sustainability means?  
 Sustainable e-Commerce report 2024, N=1974, all respondents, Sustainable e-Commerce report 2023, N=1828, all respondents, Sustainable e-Commerce report 2022, N=1709, all respondents, Sustainable e-Commerce report 2021, N=1530, all respondents



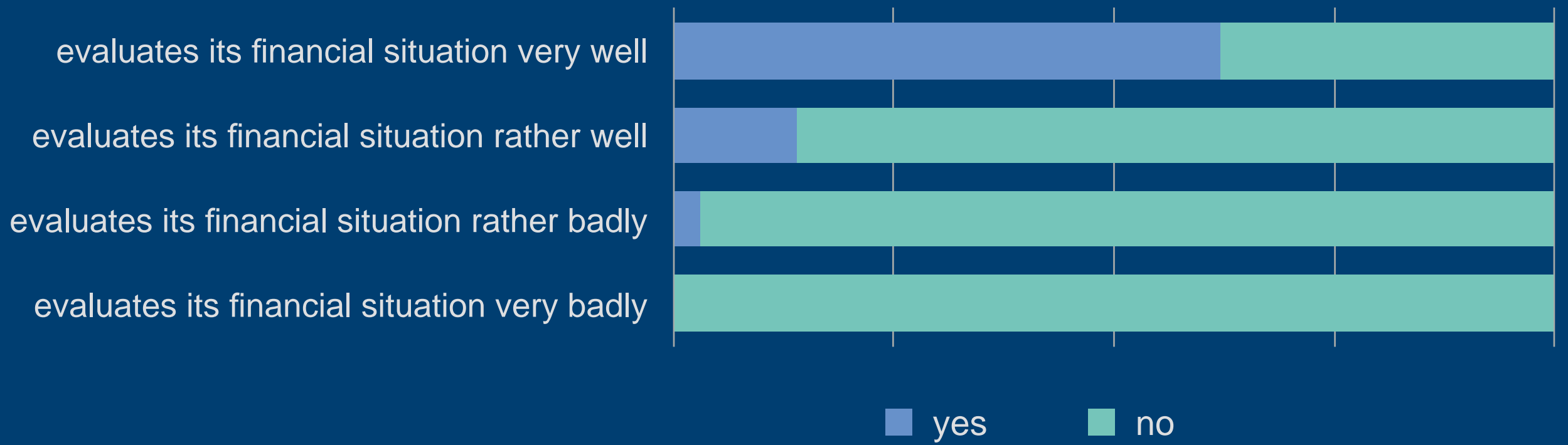
**GRAPH 2**

Do you know what the concept of economic sustainability means?  
 Sustainable e-Commerce report 2024, N=1974, all respondents, Sustainable e-Commerce report 2023, N=1828, all respondents, Sustainable e-Commerce report 2022, N=1709, all respondents, Sustainable e-Commerce report 2021, N=1530, all respondents



**GRAPH 3**

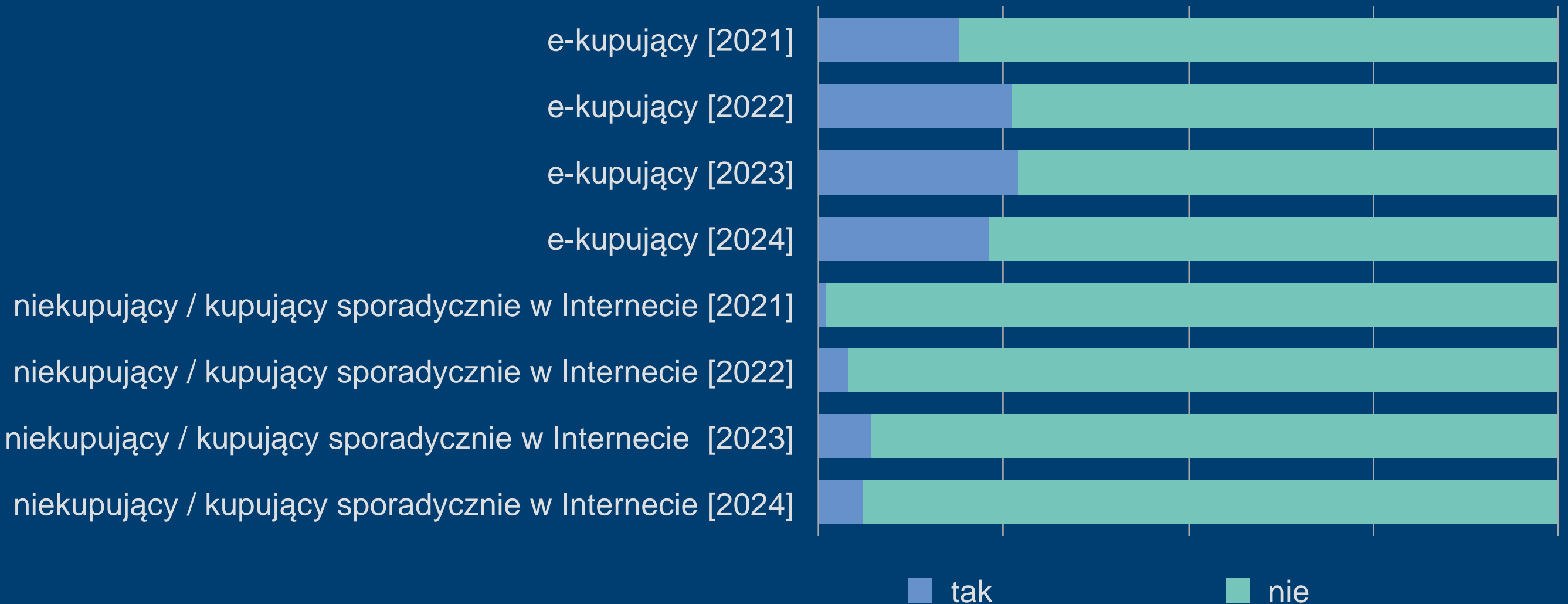
Do you know what the concept of economic sustainability means?  
Sustainable e-Commerce 2024 report, N=1974, all respondents



► The concept of economic sustainability is also far more familiar to those who consider their financial situation to be good or very good. As many as 6 in 10 people who rate their situation as very good are familiar with the concept (a huge increase compared to last year +24pc). Familiarity generally also increases significantly - similarly to last year - after respondents exceed the level of earnings of PLN 5000+ per month. On the other hand, among those who assessed their material situation as bad, virtually no one declared knowledge of the concept (3%). Apparently, aspects of ecology and social responsibility are implemented when basic human needs are met. In this context, it is necessary to popularize the principles of SD, which is undoubtedly a very complex social issue that requires a holistic approach and continuous action. The relationship between the regular use of e-commerce and the level of awareness of what is sustainable development in the economy is also invariable. Even though this year's e-buyers' level of knowledge has dropped slightly, still almost 4 times as many regular e-buyers as mainly offline shoppers are familiar with the concept of SD.

**GRAPH 4**

Do you know what the concept of economic sustainability means?  
Sustainable e-Commerce report 2024, N=1974, all respondents, Sustainable e-Commerce report 2023, N=1828, all respondents, Sustainable e-Commerce report 2022, N=1709, all respondents, Sustainable e-Commerce report 2021, N=1530, all respondents





## Paweł Oksanowicz

HEAD OF RESPONSIBLE E-COMMERCE / ESG  
THINK TANK AT CHAMBER OF DIGITAL ECONOMY

9 out of 10 large companies and 79% of all e-tailers surveyed see the benefits of an ethical and responsible approach to business. This sustains the positive signals coming from the broader market - customers, experts, government. Larger companies are leading the way, and smaller players are trying to be proactive in integrating ESG initiatives into their business models.

For the sector as a whole, this doesn't mean pressing "stop," just maintaining the existing efforts of big business - a continuous analysis of the impact on the environment. For smaller ones - a necessary strategic and organizational effort to translate values considered progressive into daily operations.

An important indicator is that one in four e-businesses is already considering the carbon footprint of operations and almost as many plan to measure it in the coming year. This approach ensures sustainability in an industry that is constantly evolving.

Certainly, customer rights and satisfaction are priorities for all e-commerce companies, with many focusing on improving service efficiency and preventing errors. However, the fact that only 20% are actively countering dark patterns raises consumer protection concerns. It is also disturbing that almost half of managers are unaware of whether these fraudulent practices are being addressed by the company.

At the same time, if listening to customers and employees becomes even more important in the opinion of managers, then e-commerce will provide further impetus for long-term success, which is what I wish for everyone.



**CK LEGAL**

## Mec. Magdalena Golonka

COORDINATOR OF THE CSR THEME OF E-CHAMBER,  
PARTNER, LEGAL COUNSEL,  
CK LEGAL CHABASIEWICZ KOWALSKA AND PARTNERS

Sustainability enables economic activity to be carried out in a way that meets the needs of the present while ensuring that future generations can realize their own. In European Union documents, sustainable development is based on three key pillars: economic, environmental and social, which are mutually supportive and complementary.

The EU requires that trade policy fully promote sustainable development, which means pursuing economic development in line with:

- ▶ social justice,
- ▶ respect for human rights,
- ▶ high labor standards,
- ▶ and high environmental standards.

EU trade policy is designed to promote sustainable development in many areas, including e-commerce.

In the context of the digital economy, platforms, online stores and companies should balance the pursuit of profitability with responsibility to society and the environment. This includes implementing measures to reduce the carbon footprint of digital production and operations, and enhancing the privacy of consumer data.

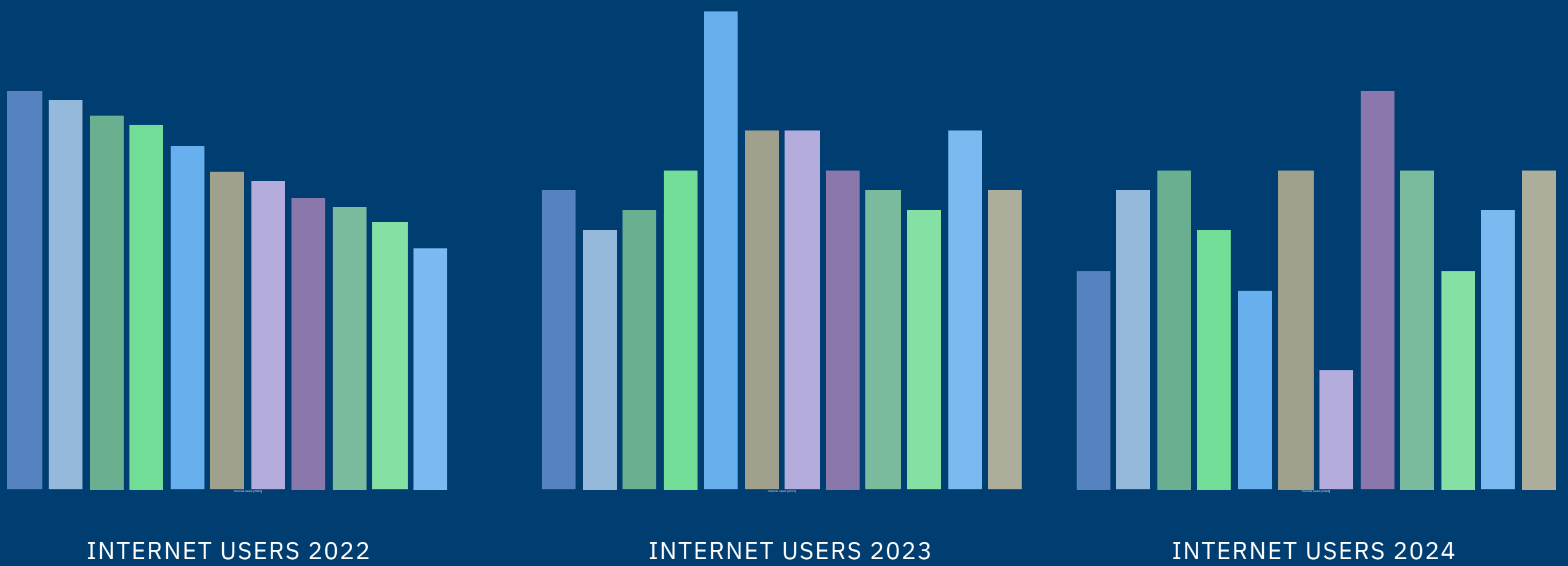
Both of these aspects will become increasingly important in upcoming EU regulations, making it important for businesses to focus their attention on them now.

On average, consumers - identifying what responsive e-commerce is for them - indicated almost 2 responsible actions. This is similar to a year ago. So, unfortunately, we don't notice any improvement or greater visibility of e-commerce activities in this aspect. However, there has been a change in the top of the indications. This year, one in five respondents believes that a responsible e-business offers returns to a parcel machine or other dedicated point (+4pc increase). The importance of accessibility of parcel machines for people with special needs has increased (16%, +2p.p.). We had already recognized a similar trend - i.e., paying closer attention to the method of delivery, rather than, for example, only eco-friendly packaging - in the e-Chamber survey "Logistics and Delivery, Key to e-Success" from earlier this year. Another 16% of those currently surveyed would like to have eco-friendly delivery without additional surcharges, or with the e-tailer donating a certain amount to some positive cause. This year, the re-commerce option gained +1p.p., while last year's top two indications lost ground. Only one in 10 consumers is paying attention to e-tailers and digital brands striving for climate neutrality (-14p.p.). Offering the option of a surcharge to offset carbon footprint also saw a decline. Only 6% of Internet users, compared to 18% a year ago, consider this a sign of responsible e-commerce.

**GRAPH 18**

If you had to say what responsible e-commerce is, it would be...?

*Sustainable e-Commerce report 2024, N=1974, all respondents, Sustainable e-Commerce report 2023, N=1828, all respondents, Sustainable e-Commerce report 2022, N=1709, 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
- oferowanie przez e-sklep możliwości dopłaty za rekompensatę śladu węglowego
- e-shop offering the possibility of a surcharge to compensate for the carbon footprint
- 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-retailer's support of pro-social, pro-environmental, local initiatives
- offering by the brand / e-store to return / resell used products (recommerce)



**allegro**

## Marta Mikliszańska

DIRECTOR OF PUBLIC AFFAIRS AND ESG  
ALLEGRO

We have been following consumer perceptions of what companies are doing in the area of sustainability with great interest. We were particularly pleased that consumers see the Polish e-commerce market as working more actively in the area of responsible development compared to foreign markets. We trust that we have a contribution to make.

This is because in our activities we implement the demands for sustainable development indicated by those surveyed. We are implementing sustainable packaging, which is highlighted by almost two-thirds of the respondents. In line with our ESG strategy, we want 100% of the packaging put into circulation in Allegro's own operations to be sustainable by 2028. We are also encouraging sellers to adopt such solutions by giving them easy access to sustainable packaging and by conducting educational activities at Allegro Academy.

Another important area is the security of customers and their data. We take this topic very seriously at Allegro and another point in our strategy is related to it, namely regular training of employees and staff on cyber security.

More than 40% of customers also pay attention to the possibility of buying certified products. Allegro offers a huge database of environmentally certified products that help customers make informed choices to reduce their environmental impact.

The results of the survey of entrepreneurs are also interesting, primarily because companies implement a lot of activities that are invisible to the consumer on a daily basis. One example, of course, is sustainability reporting. At Allegro, we have been implementing it for several years, but in next year's report we will be using a new reporting standard that expands reporting obligations and makes external auditing of data mandatory. This is expected to make reports more reliable. You could see our forethought to this process in the already released [2023 ESG Report](#), in which we also presented our ESG strategy.

We are also working on the accessibility of our products and services. This is also an area that isn't immediately apparent to everyone, but everyone may be in a situation where reaching a parcel machine without having to climb stairs becomes important to them. That's why more than 95% of OneBox vending machines meet our accessibility standards. We are also aiming to increase the accessibility of our websites and applications every day.

Helping in this effort are new regulations that make certain sustainability measures mandatory and will soon be standard for companies to operate. Therefore, we have no doubt that e-commerce will become more and more responsible, but we want to walk in the front line of this change.

# allegro BUSINESS

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## Paweł Wojciechowski

INTEGRATED COMMERCE DIRECTOR  
PUBLICIS COMMERCE

I pay attention to ethical and environmental issues, as they are personally close to me on a very human value level. On top of that, I work at the intersection of eCommerce and media, which gives me the opportunity to look at the actions of businesses and the reactions of consumers - both from the implementation side and the communication layer. I also have the pleasure of frequent participation in conferences, where the topic of corporate responsibility is present and discussed in various contexts. We repeatedly discuss reCommerce, sustainability, packaging recycling, non-price selection criteria and growing consumer awareness. However, looking at the actual actions of end customers, I often get the impression that popular narratives can be very close to reality.

The results of the survey are interesting, and - despite year-on-year fluctuations - I rate them as optimistic. However, I have 2 doubts. The first - these are obviously declarative data. Respondents tend to present themselves in a better light, as everyone prefers to think of themselves as good people. The second is the CAWI methodology, which itself profiles the sample somewhat, and I am very cautious about generalizing it both to the survey population and to all Poles. I will admit that I would most like to see the survey in the form of an A/B test on online shoppers. It would be possible to verify the real willingness of Poles to pay extra for eco-friendly packaging, acceptance of longer delivery times and prices reflecting a responsible approach to production. As far as I know - the pilot projects in this area so far do not encourage widespread implementation of such solutions. Chinese trading platforms are doing well, and my impression is that the stated preference for shipping from Poland has more to do with concern about added VAT than about carbon footprint.

In my opinion, self-regulation of the industry without systemic solutions is unlikely. This is also not helped by the fact that the largest trading platforms - both in Poland and globally - rely on 3rd party vendors in huge part. It's good that we're talking about ESG, it's great that consumer awareness is growing, that - especially the younger generation - is declaring less price sensitivity. In the end, however, it's real wallets that decide, so without top-down, comprehensive regulations that also take into account practicalities (vide the delayed bail-in system) deeper changes won't happen quickly. Whatever we declare.

To end on an optimistic note - there is a well-known report that says reCommerce will account for 14% of the eCommerce market in 2026. At least several players in our market, are very active in this area. I believe that they can have a significant share in this, in which I heartily root for them.

# Highlights

- ▶ Knowledge of sustainability concepts is still quite low, and this year has brought no improvement. Progress can be seen in the case of Old Millennials and Generation X, whose representatives have significantly improved their knowledge of sustainability, as have affluent people who rate their financial situation as very good.
- Familiarity with the concept of economic sustainability among surveyed consumers has declined slightly - by -3pc compared to last year and stands at 16%. There was a slight increase, on the other hand, in familiarity with the concept of ESG, with which 20% of Internet users are now familiar.
- Similarly - and, unfortunately, not very optimistically - is the familiarity with the concept of responsible business. Here, awareness of what SD (sustainable development) is, or sustainable development, or possibly CSR, or socially responsible business, has 17% of respondents, compared to 23% in 2022 and 8% even a year earlier. Contact with the term ESG, on the other hand, is declared by 20% of respondents, up slightly from a year ago (+1p.p.).
- What sustainability is generally known by 14% of consumers surveyed, the same as last year. However, a couple of upward trends can be seen regarding where to find out about SD. The strongest upward trend concerns information on packaging. This year, it was through packaging that 28% of Internet users learned about SD (+13p.p.). From their workplace, 41% of Internet users generally learn about SD, but it is workplaces that practice socially responsible business that are on a clear growth path (26%, +7p.p.).
- This year, internet users believe that sustainability is already a must for companies that want to be competitive. In contrast, the importance of SD in the area of positive image has declined somewhat. This year, respondents additionally recognize that companies should do more in the SD / ESG area to actually make a difference.
- After the increase in indications in 2023, it is clear that this year consumers expect a little less from e-business. This year, they primarily demand that e-tailers educate on social responsibility 17% (+7pc) and that products are ethically produced 17% (+5pc). This clear demand and the polarization of consumer opinion in this area leads to the conclusion that businesses should focus on these 2 specific areas.

# STRATEGIC E-BUSINESS APPROACH TO RESPONSIBLE AND SUSTAINABLE DEVELOPMENT

∴ CHAMBER OF DIGITAL ECONOMY REPORT | 2024





# THE SAME START

## CHAMBER OF DIGITAL ECONOMY'S CAMPAIGN

The Same Start is the Chamber of Digital Economy's campaign dedicated to matters related to the equal legal and competitive framework for Asian and European e-commerce entrepreneurs, with a special focus on e-businesses operating in Poland. The activities undertaken by the e-Chamber in collaboration with its affiliates are targeting the business milieu, consumers, and government authorities. The scope of the campaign includes the following:

- ✓ Actions to increase the effectiveness of Polish and EU legal instruments vis-à-vis non-EU platforms; these strive to:
  - ensure effective enforcement of consumer protection legislation;
  - ensure that consumers can easily and efficiently interact with the platforms;
  - sanction behaviour that violates the principles of fair competition;
  - introduce solutions enabling effective enforcement of judgments.
- ✓ Ongoing dialogue with the Ministry of Finance and the Ministry of Economic Development and Technology – [Official standpoints, demands, and opinions](#)
- ✓ Dialogue with Ecommerce Europe with a view to analysing markets – [Ecommerce-Europe legislation](#)
- ✓ Regular meetings of the specialist group dedicated to The Same Start
- ✓ The e-Chamber's initiative consisting in a dialogue between the world of business and public administration under the banner of The Same Start, held on February 22, 2024.
- ✓ European e-Commerce Summit, held on May 23, 2024 in Warsaw - Report from the event
- ✓ Year-round campaign targeting the business milieu – [Resources for business](#)
- ✓ Cooperation with the Consumers Federation aiming to educate consumers – [Resources for the consumer](#)
- ✓ Analyses and reports – [Analysis of the Chinese market by the e-Chamber's expert on China](#)
- ✓ Year-round media campaign

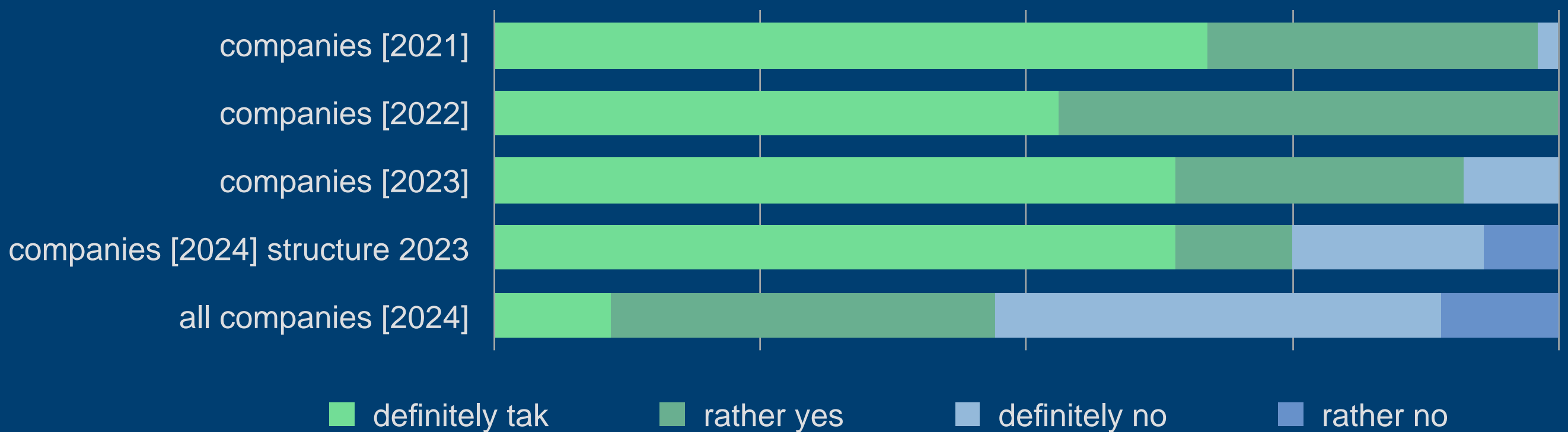
If you are interested in membership of the Chamber of Digital Economy and The Same Start campaign, please contact us at [biuro@eizba.pl](mailto:biuro@eizba.pl).

# Acting responsibly

Companies should act responsibly towards employees, customers, the environment, suppliers and business partners, so in general many stakeholder groups and the environment. Currently, 47% of all, as many as 61% with revenues of up to PLN 5 million and 75% of the largest e-commerce companies have made such a declaration. This is less than last year, however, it is worth noting that the percentage of companies clearly indicating that they act responsibly (answer: “definitely yes”) has not decreased.

**GRAPH 28**

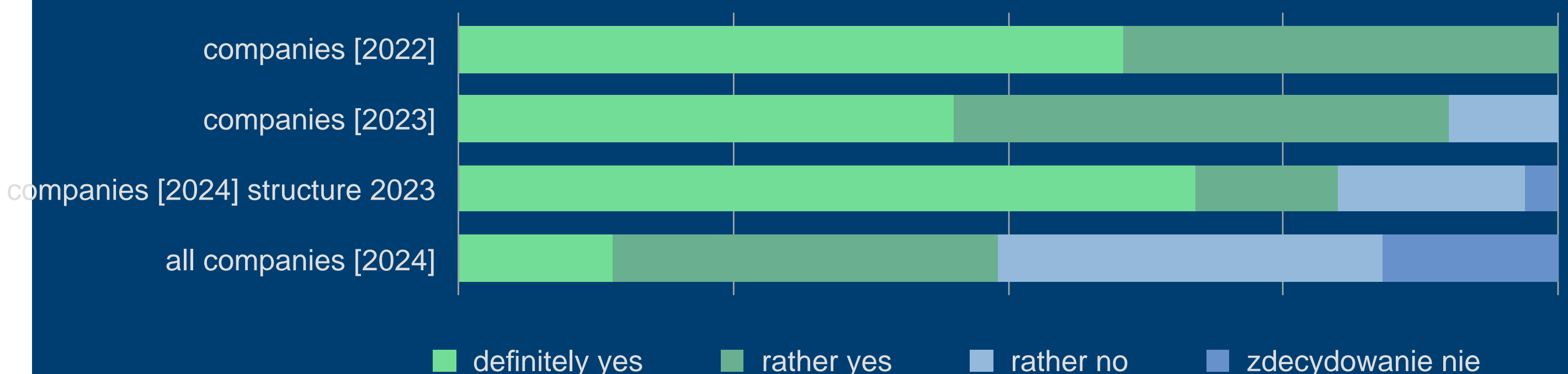
Does the company where you work act responsibly towards employees, customers, the environment, suppliers, business partners (operates in the area of corporate social responsibility)?  
*Sustainable e-Commerce report 2024, N=555, e-business, Sustainable e-Commerce report 2023, N=55, e-business, Sustainable e-Commerce report 2022, N=53, e-business, Sustainable e-Commerce report 2021, N=54, e-business*



In addition, 6 out of 10 of all e-businesses, are run, according to the managers' statements, in an ethical and responsible manner. Among the largest e-gamers, this is 8 in 10 (9 in 10 last year).

**GRAPH 29**

In your opinion, does the company conduct e-commerce in a responsible/ethical manner?  
*Sustainable e-Commerce report 2024, N=555, e-business, Sustainable e-Commerce report 2023, N=55, e-business, Sustainable e-Commerce report 2022, N=53, e-business, Sustainable e-Commerce report 2021, N=54, e-business*



# Highlights

- ▶ This year, familiarity with the concept of responsible e-commerce is known among 34% of all surveyed e-businesses, while for the largest e-businesses, 7 out of 10 know the concept.
- At the same time, the surveyed managers also rate very highly the proximity of the aforementioned ideas in their companies. As a year ago, ratings hover around 5 on a scale of 1-6.
- Companies strive to act responsibly towards employees, customers, the environment, suppliers and business partners. Currently 47% of all surveyed companies have made such a declaration, which is an impressive result, considering that we also included the smallest e-commerce entities in the survey. Also 75% of the largest e-commerce players act socially responsible.
- Motivations for acting in accordance with socially responsible development principles are, as last year, very diverse, especially among all the companies surveyed. The largest pay attention to aspects of image, but also indicate that it stems from the company's values and the standards set at headquarters. The rest of the market mostly mentions aspects of building a positive image, socially positive action being considered a must-be, and contractor requirements.



e-COMMERCE POLSKA  
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## KATEGORIE DLA E-COMMERCE

BEST E-COMMERCE B2B  
PODMIOTY ŚREDNIE I DUŻE

**CENEO**

DESIGN&USABILITY  
PODMIOTY MAŁE



DESIGN&USABILITY  
PODMIOTY ŚREDNIE I DUŻE



BEST E-COMMERCE LOYALTY PROGRAM  
PODMIOTY ŚREDNIE I DUŻE



BEST E-COMMERCE RETAILER  
PODMIOTY ŚREDNIE I DUŻE



BEST IN OMNICHANNEL



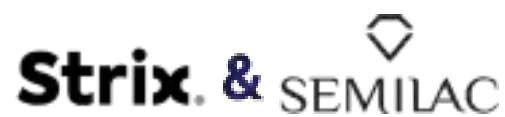
BEST SUSTAINABILITY INITIATIVE  
PODMIOTY MAŁE



BEST SUSTAINABILITY INITIATIVE  
PODMIOTY ŚREDNIE I DUŻE



BEST ADAPTATION  
TO NEW DIGITAL REALITY: B2C



BEST ON MOBILE



BEST USE OF AI IN E-COMMERCE



BEST IN CROSSBORDER



BEST CAMPAIGN  
PODMIOTY MAŁE

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PODMIOTY ŚREDNIE I DUŻE



BEST PRODUCER IN E-COMMERCE  
PODMIOTY MAŁE



BEST PRODUCER IN E-COMMERCE  
PODMIOTY ŚREDNIE I DUŻE



## KATEGORIE DLA E-USŁUG

BEST TOOL FOR E-COMMERCE



BEST OMNICHANNEL TOOL/TECHNOLOGY/SERVICE



BEST LOGISTIC TOOL



BEST E-COMMERCE B2B TOOL/TECHNOLOGY/SERVICE



BEST AUTOMATIZATION TOOL/TECHNOLOGY IN E-COMMERCE



## KATEGORIE DLA E-FINANSE

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# A SUSTAINABLE E-COMMERCE MARKET

∴ CHAMBER OF DIGITAL ECONOMY REPORT | 2024

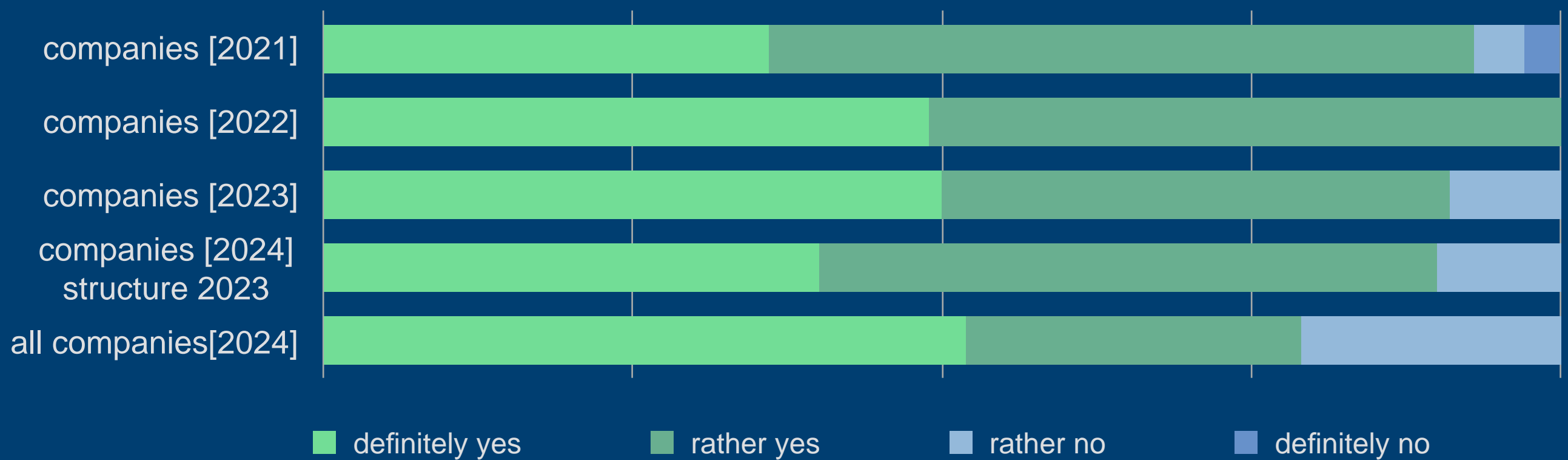


# Benefits of running a responsible business

▶ Nearly 9 in 10 of the largest e-firms (identical to the previous year) see the benefits of conducting e-business in an ethical and responsible manner. Among all companies surveyed, the percentage reached 79%, a very positive result. Apparently, responsible e-business simply pays off for companies, but also - as shown by the motives for conducting it declared by managers - it's already a must-be of e-commerce as well.

GRAPH 33

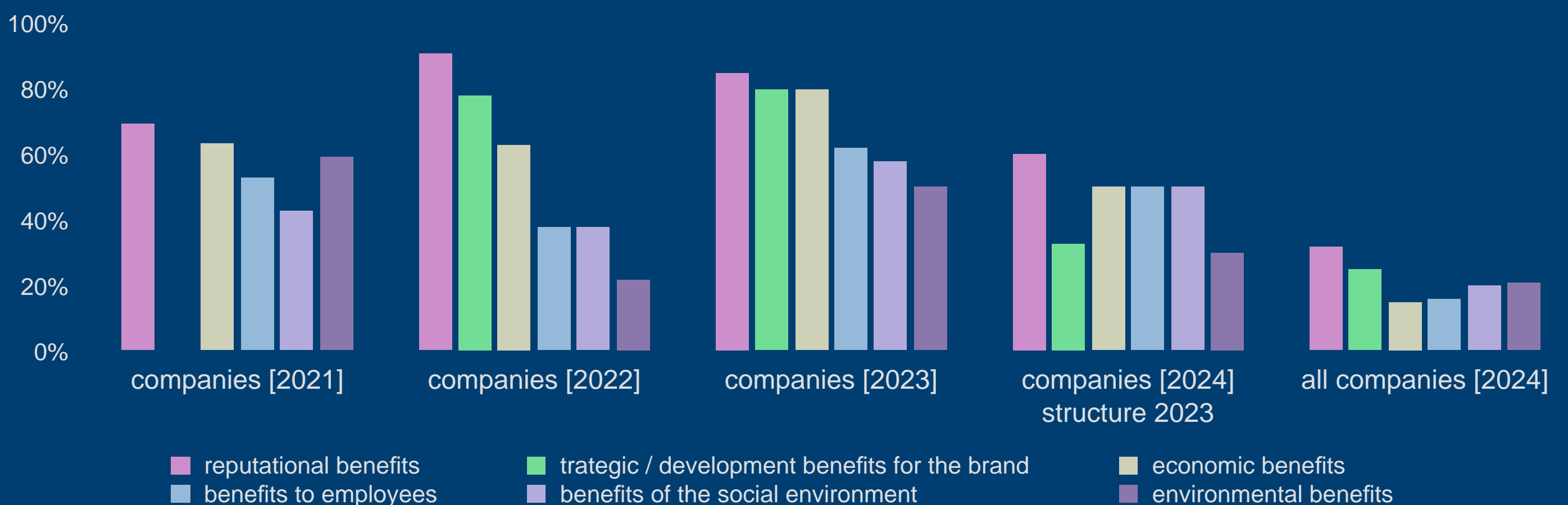
Does the company benefit from doing business in a responsible/ethical manner?  
 Sustainable e-Commerce report 2024, N=555, e-business, Sustainable e-Commerce report 2023, N=55, e-business, Sustainable e-Commerce report 2022, N=53, e-business, Sustainable e-Commerce report 2021, N=54, e-business



▶ This year, the benefits are heavily diversified. It's also apparent that, in general, e-commerce players are indicating fewer of them than a year ago. This can be worrying, especially when we look at the declarations of the entire market, that is, including small e-gamers. Here, image benefits are the most important, followed by development and environmental benefits, but none of the aspects exceeded 40% of indications, which was standard for large companies.

GRAPH 34

What areas do these benefits apply to?  
 Sustainable e-Commerce report 2024, N=555, e-business, Sustainable e-Commerce report 2023, N=55, e-business, Sustainable e-Commerce report 2022, N=53, e-business, Sustainable e-Commerce report 2021, N=54, e-business





| whites

## Marcin Kubik

PARTNER, HEAD OF GROWTH  
WHITES AGENCY

With growing consumer awareness and emphasis on environmental and social responsibility, more and more companies in the e-commerce industry are embracing sustainability. Implementing SD (sustainable development) and ESG (Environmental, Social, Governance) strategies is no longer just an add-on, but is becoming a key element of running a modern business. The “Responsible e-Commerce 2024” report shows that responsible e-business has real benefits, but it is crucial that companies act authentically and avoid greenwashing.

Major e-firms are increasingly recognizing the benefits of conducting responsible business. 8 out of 10 of the largest e-commerce players believe that SD and ESG activities bring tangible results. Customers appreciate transparency and brands' commitment to sustainability. Companies are choosing to work with sustainable suppliers, investing in innovations to minimize their environmental impact, and improving their reputation through transparency.

Consumer attitudes toward corporate responsibility are also changing. For today's customers, ESG activities are not just a marketing tool, but a necessity. Still, consumers believe that companies should do more to ensure that their SD activities actually contribute to positive change.

Promotions and low prices still matter, but more and more customers are choosing e-tailers on the basis of eco-friendly measures. As many as 26% of consumers pay attention to the ideas behind the brand, and 25% pay attention to certifications and fair business practices. Responsible development is becoming a key criterion for choosing an online store.

More and more consumers are ready to abandon a purchase if it does not meet their environmental standards. As many as 41% of customers will give up if a product is shipped from far away, such as China, which shows a growing sensitivity to the environmental impact of transportation.

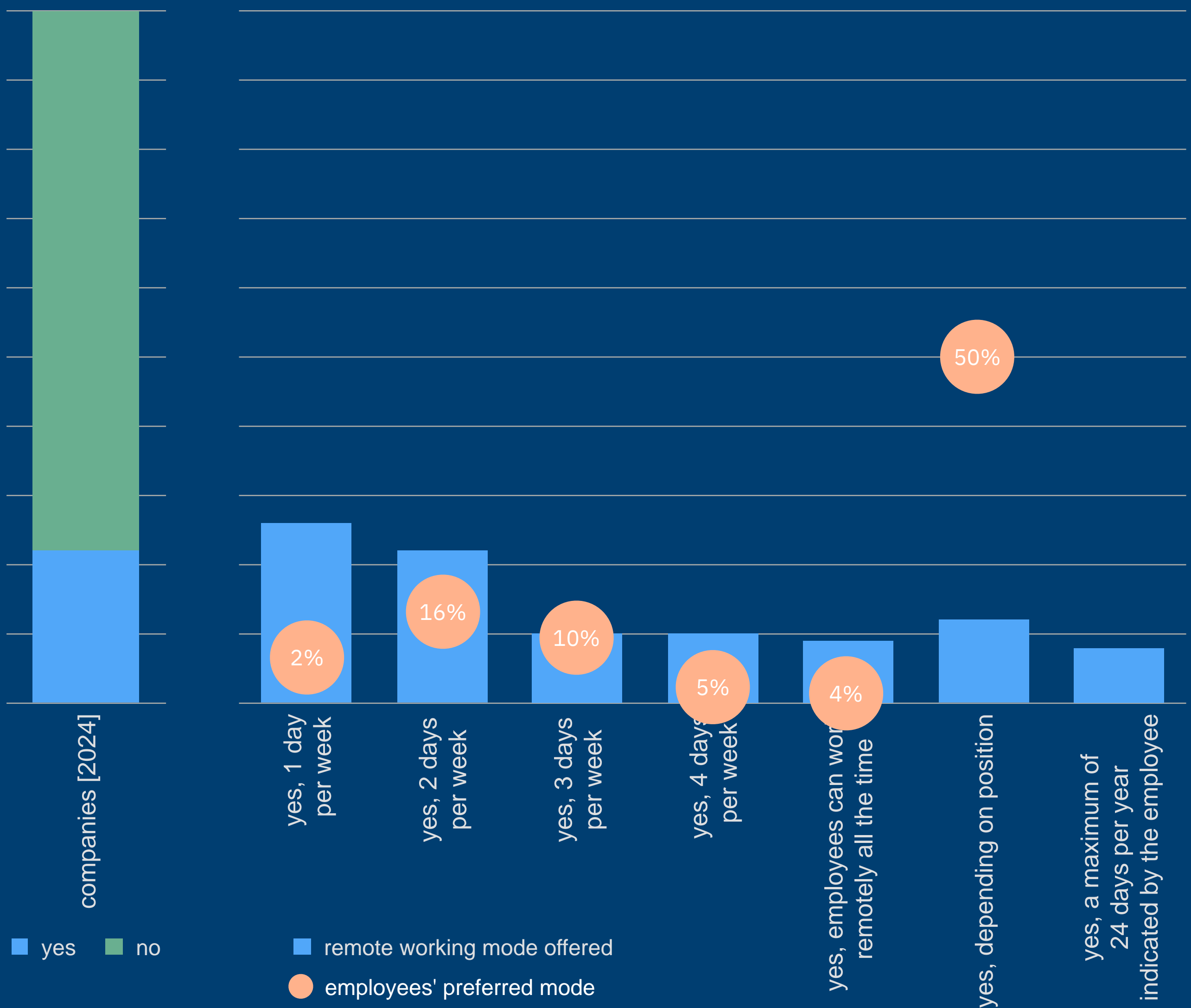
Implementing environmentally friendly measures is not enough if the company does not ensure proper, transparent communication. Consumers are becoming increasingly cognizant of greenwashing, which is the false portrayal of activities as greener than they really are. Companies need to avoid this trap, because building a green image without real investment is risky. Consumers expect clear, reliable information - whether on the website, social media or advertising campaigns. We covered the topic of Brand Purpose and the pitfalls of greenwashing extensively during one of Whites' webinars. I encourage you to watch the video: <https://bit.ly/gwashing>.

Transparent communication is key to gaining customers' trust, but at the same time, it is the business that verifies the authenticity of SD and ESG activities. Genuine investments in sustainability are costly, but necessary for a company to be seen as authentic and trustworthy.

► An interesting area when it comes to employee advocacy is organizing and enabling remote work. It turns out that in the e-commerce market only 10% of entities do not offer such a solution, however, the feelings of companies about the positive impact of remote work in the long term on employee satisfaction, as well as less harmful to the environment (thanks to less traffic within the city) are mixed. As many as 37% of e-business representatives believe that remote work significantly reduces efficiency in the long term, while 45% think so about employee satisfaction. And coming back to the model, or dimension of remote work, it turns out that employees prefer the most flexible solutions, i.e. that they themselves can choose when they go to the office (after booking a workspace) and when they would like to work from home. In turn, companies most often offer the option of 1 or 2 days of remote work on predetermined days.

GRAPH 42

Does your company offer employees the opportunity to work remotely? In what mode?  
 Sustainable e-Commerce 2024 report, N=555, e-business, N=1974, internet users





## Katarzyna Czuchaj-Łagód

MANAGING DIRECTOR, MOBILE INSTITUTE  
COUNCIL MEMBER, CHAMBER OF DIGITAL ECONOMY

New in this year's report is a block of questions devoted to remote pacy. It is already a permanent part of corporate culture and HR discussion, not only in Poland.

The analysis of this area brought interesting conclusions. Well, while some companies see remote work as a way to improve employee well-being and contribute to sustainability - citing flexibility and reduced commuting - others deny both its positive impact on the environment and employee well-being.

This divided landscape is as follows

- ▶ only 30% of all companies surveyed (and 40% of the largest) see environmental benefits;
- ▶ 37% question its positive impact on productivity and 56% question its long-term impact on team satisfaction levels

This means that not everyone is convinced by the remote model and certainly bases their opinion on experience and internal indicators.

The fact that nearly half of managers in e-firms believe that working remotely reduces long-term satisfaction in teams leads to the conclusion that maintaining morale and productivity becomes a key challenge. This is especially true in technology-oriented sectors, where collaboration and innovation are often fostered through in-person interactions. But, is it only there? The popularity of hybrid models in which teams work remotely 1-2 days a week suggests that there is an ongoing search for a compromise to balance flexibility with the need to interact in the office, over coffee, or over lunch together.

Ultimately, although remote work is becoming more common, its fixed image is not solidified. Concerns on the part of companies relate to its impact on productivity and employee satisfaction. Through this, the search for the ideal employment model in the e-commerce sector becomes a fascinating research issue, and we will continue it in the years to come.

# Highlights

- ▶ One in four e-businesses surveyed considers the carbon footprint from their website or e-commerce site and the products they offer on their e-commerce sites. In the coming year, 22% intend to measure their carbon footprint.
- Nine out of 10 large players and more than half (52%) of all e-commerce market players are engaged in social responsibility activities.
- In the area of respecting e-customers' rights, companies primarily point to customer service efficiency (e-consumer monitoring, opinion analysis, satisfaction measurements) and process optimization aimed at reducing the possibility of mistakes by employees. They also focus on crisis management and managing the risk of leakage of e-customer data .
- Every 5th e-company counteracts so-called “dark patterns”, i.e. tries to prevent “impersonation” of the service / site and generally misleading and harming customers, but also 49% of the surveyed managers do not know if such activities are carried out in their companies. .
- Businesses study the feedback of their stakeholders, primarily customers and employees. Only 29% of the largest e-gamers do not conduct such surveys, and unfortunately, still more than half of the companies, if we look at all e-commerce entities surveyed.
- Nearly 9 in 10 of the largest e-firms (identical to the previous year) see the benefits of conducting e-business in an ethical and responsible manner. Among all companies surveyed, the percentage reached 79%, a very positive result

# AWARE E-CONSUMER

∴ CHAMBER OF DIGITAL ECONOMY REPORT | 2024



# Dose of data

## ▶ E-CONSUMER AWARENESS IN AN ERA OF SLOWDOWN



on a scale of 1-6 - this is the extent to which implemented sustainability or responsible business activities are important to e-customers when choosing an e-store. Here we note a decline vs. 3.94 2023 vs. 4.19 2022. So it's still not a primary factor or advantage, rather it's becoming "complementary".

42% ▲

respondents (+4p.p.) pay attention to whether the e-store sells certified products. The more often respondents buy online, the more important this aspect is to them.

37% ▲

Internet users (+7p.p.) check whether an e-store provides social or sustainability reports, which encourages them to buy. Among e-buyers, 38% do so regularly, while those who buy 5+ times a month are up to 59%.

## BEING SOCIALLY RESPONSIBLE PAYS OFF

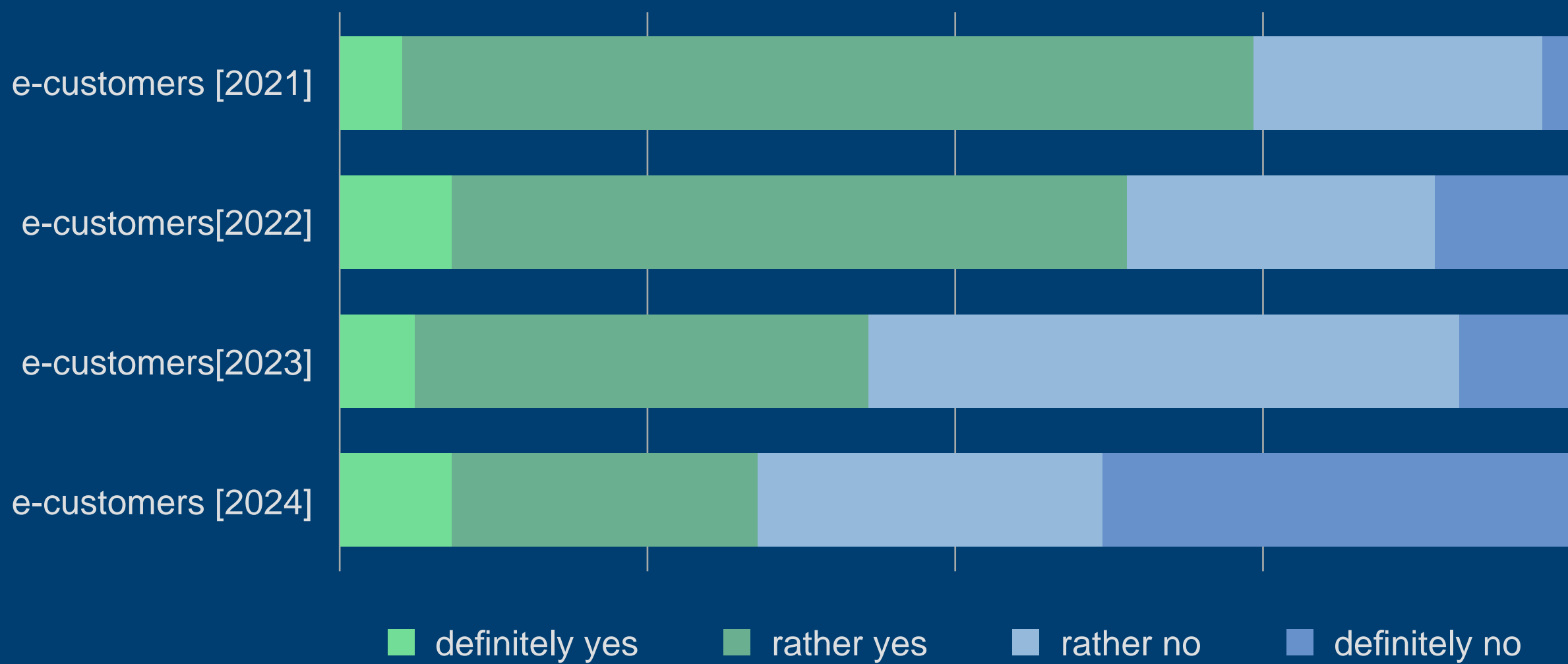
Like a year ago, in 2024, 6 in 10 respondents say they check whether an e-business is socially responsible. Most often, consumers do this by looking for information on product packaging, followed by the retailer's website and a Google search for information.

▶ This year, 64% (+6p.p.) of surveyed regular online shoppers admit that they consider whether a retailer is a responsible, sustainable company when choosing an online store. Interestingly, this year - like last year - significantly fewer respondents, only 34% (vs. 43% in 2023 vs. 73% in 2022), declare that operating an e-business in accordance with SD principles positively affects the image in their eyes. In the case of buyers, most often, one in two believe that responsible actions affect the company's positive image and encourage purchases. Perhaps social responsibility is actually a necessity and an everyday occurrence already, and really concrete and meaningful actions of e-businesses are appreciated.

**GRAPH 60**

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

*Sustainable e-Commerce report 2024, N=1334 buying regularly online, Sustainable e-Commerce report 2023, N=1230 buying regularly online, Sustainable e-Commerce report 2022, N=980, buying regularly online, Sustainable e-Commerce report 2021, N=735, buying regularly online*



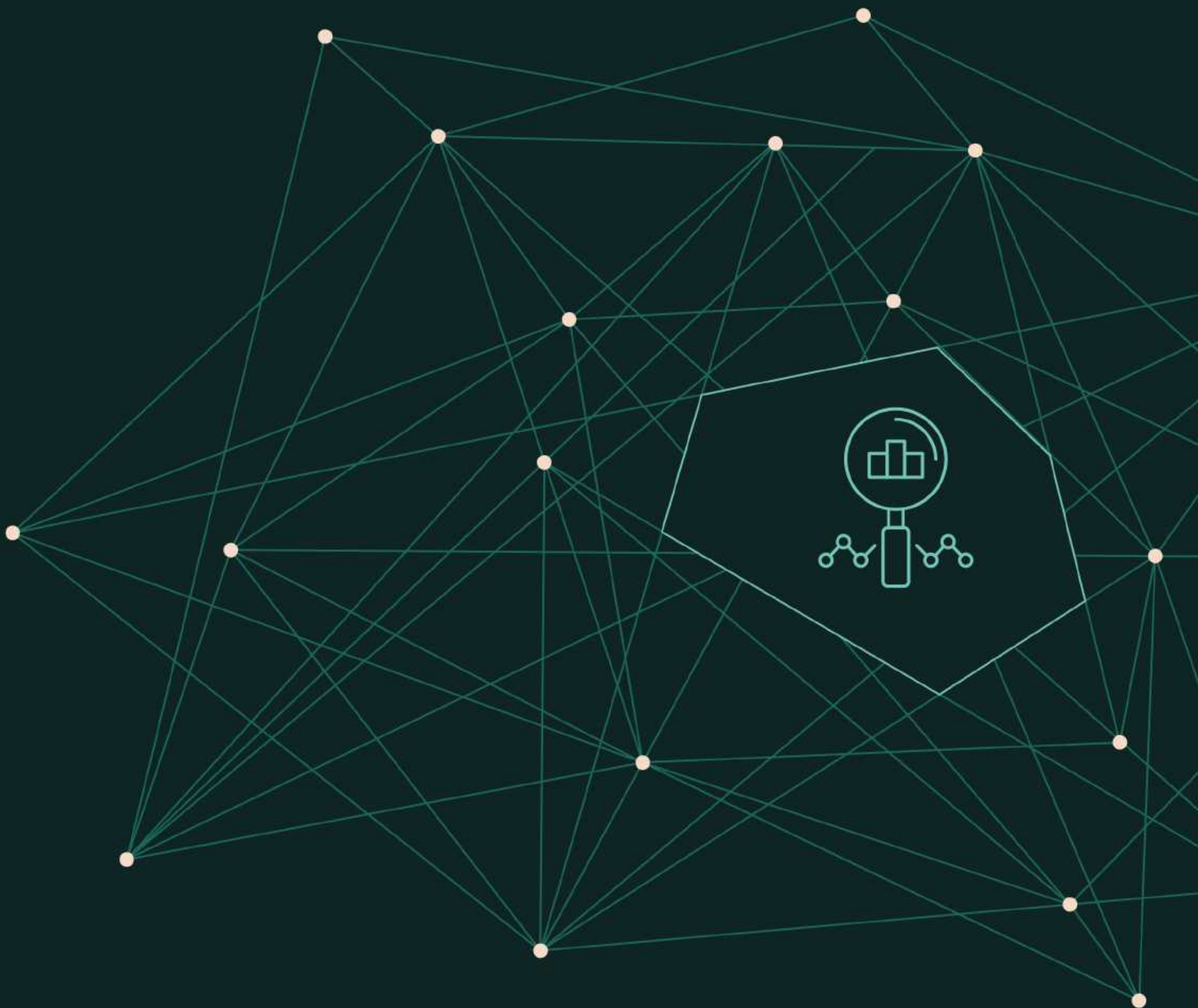
▶ This year, e-buyers are more diverse when it comes to their preferred delivery time. As many as 37% of e-commerce customers are able to wait up to 4 days after making a purchase. A maximum of 2 days will wait 24% vs. 25% a year ago, but same day or next day parcel delivery is now wanted by 18%, compared to 12% a year ago (+6p.p.). On the other hand, unfortunately, the number of consumers who are able to wait for a package for the reason that it should be sent organically, i.e. all products delivered at once, has dropped slightly. A year ago it was 60%, and now such willingness is declared by 56% of respondents, with 32% (vs. 50% a year ago) indicating that it depends what kind of products these would be and whether they need them urgently. In turn, 63% of Internet users pay attention to the aspect of eco-friendly product packaging. This is +8pc higher than in 2023. The willingness to pay a surcharge for eco-packaging has also increased this year. It is declared by 40% (+6p.p.) of respondents. If consumers were already to pay a surcharge, 39% of e-customers might pay from PLN 5-10 or from PLN 3-5. This also implies a greater willingness to spend for this purpose.

# Highlights

- ▶ The postural factors for choosing an e-store and e-product remain very practical - price, quality, brand, composition and opinions of other consumers - but indications of SD and environmental elements have increased significantly (this is already evident from e-store choices). This year, as many as 26% (+6pc vs. 2023, and more than double that of 2022) of consumers pay attention to naturalness, and 23% of consumers (+3pc vs. 2023, +8pc vs. 2022) consider the place of production.
- When it comes to choosing a product in an e-store, the basic factors remain very practical, such as price, quality, brand, composition and friends' opinions, but indications of SD and ecology-related items have increased significantly. SD-related aspects matter to 6 in 10 consumers buying online (+10p.p.).
- E-commerce customers' expectations regarding the delivery time of orders differ. 79% of respondents (+5p.p.) expect delivery of a package they have ordered from an e-store within 4 days of placing an order. 24% (-1p.p.) are able to wait only 2 days, and 18% (+8p.p.) - one day.
- The eco-friendly aspect of product packaging is paid attention to by 63% of Internet users. This is +6pc more than in 2023. The willingness to pay a surcharge for eco-packaging has also increased this year. It is declared by 40% (+6p.p.) of respondents. If consumers were already to pay a surcharge, 39% of e-customers might pay from PLN 5-10 or from PLN 3-5. This also implies a greater willingness to spend there.
- This year, SD activities influence 48% of e-customers' purchase decisions, which is identical to 2022.
- Among the activities/responsibilities of e-stores in conducting responsible business, according to surveyed Internet users, is ensuring a sense of security online. This year's analysis of the results, shows that 39% of Poles would like the e-store to educate them about online safety, while for regular e-consumers it is, as much as 56% (that is, as much as +29p.p. vs. 2023)
- 17% of respondents have experienced a fraud attempt while shopping online. Those who have experienced a fraud attempt most often point to a fake email (55%) or SMS (32%).
- 45% of Poles are concerned about the security of their data when shopping online, including 13% who are very concerned and 31% who are occasionally concerned.

# FUTURE OF SD IN E-COMMERCE

∴ CHAMBER OF DIGITAL ECONOMY REPORT | 2024

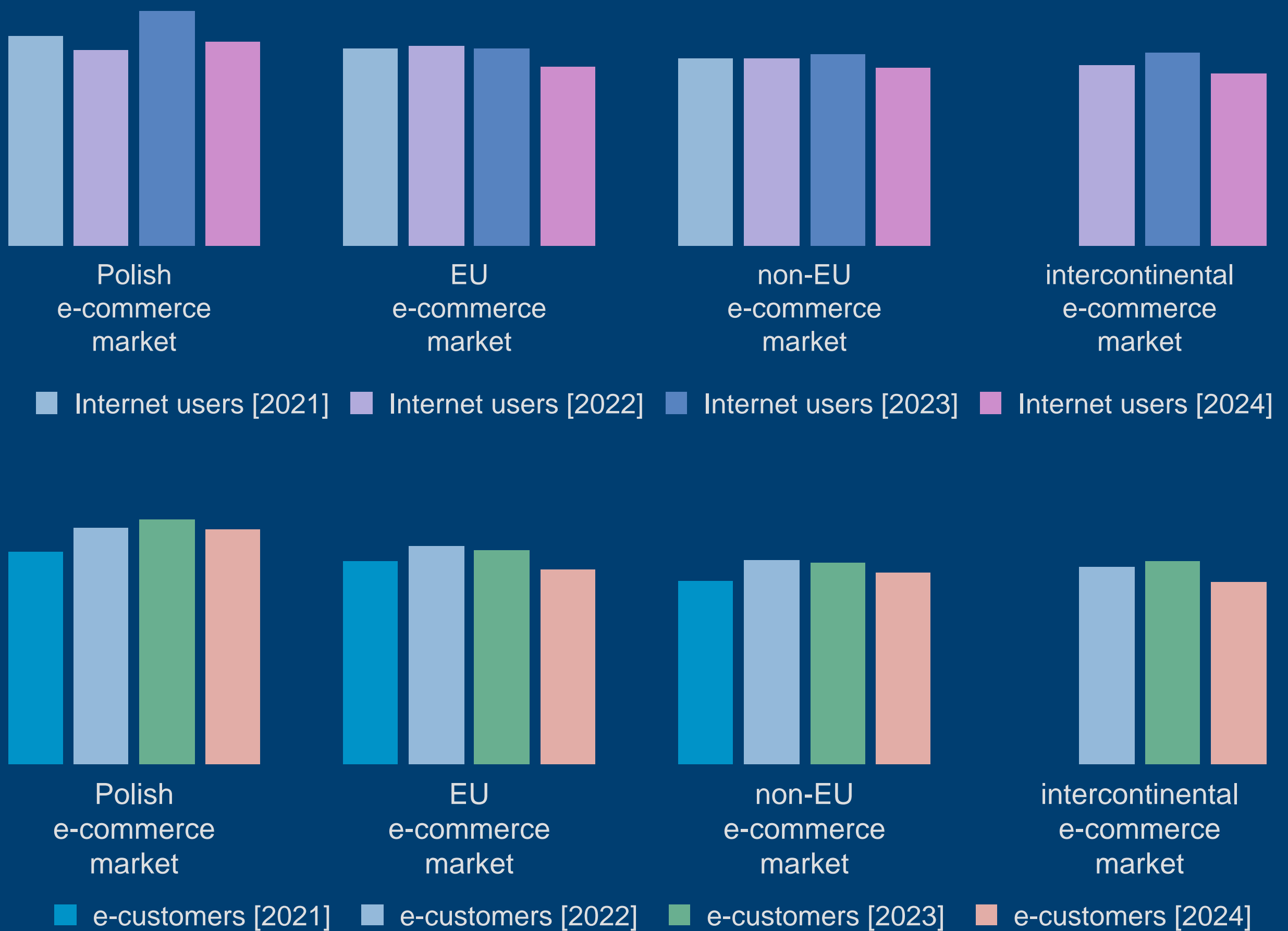


# Polish versus foreign market e-commerce

► Invariably, consumers rate the Polish e-commerce market as the most socially responsible. In 2024, however, it received a much lower rating than last year, only 3.82 on a scale of 1-6 - but (as the data show) still higher than the other markets surveyed, namely EU, non-EU and intercontinental. It is interesting to note that Internet users this year also rated the EU e-commerce market, which has so far received fairly consistent ratings, significantly lower. On the other hand, among regular online shoppers, Poland's e-commerce is rated as the only one with a rating of more than 4.06, a significant advantage in the eyes of frequent e-commerce shoppers to the other markets.

GRAPH 78

To what extent do you think the e-commerce market (...) is socially responsible?  
 Sustainable e-Commerce report 2024, N=18947 all respondents, Sustainable e-Commerce report 2023, N=1828, all respondents, Sustainable e-Commerce report 2022, N=1709, all respondents, Sustainable e-Commerce report 2021, N=1530, all respondents



► Consumers also rated the Polish e-commerce market again in terms of caring for the environment and being green. Here the rating is again below 4, and again lower than just a year ago (3.78 vs. 3.90 in 2023) but still higher than 2 years ago vs. 3.56 in 2022).



## Dr Paweł Oleszczuk

DIRECTOR  
PwC

The high rating (4.06) of the social responsibility of the Polish e-commerce market continues, which is admittedly slightly lower than in 2023 (4.19), but still above 4 and significantly higher than two years ago (3.89). This underscores the positive progress of the industry, especially compared to EU and global markets. It indicates that the sector is increasingly integrating environmental and socially responsible practices into business operations. This includes eco-packaging or energy-efficient logistics.

But there are also growing expectations for online stores to educate consumers about online safety. This reflects growing concerns about how to stay safe in the digital realm. They're not unfounded, as 17% of online shoppers have encountered fraud attempts, with phishing attacks - mainly it's fake emails (55%) and SMS (32%) - being the most common tactic of scammers.

This trend underscores the need for e-commerce stores and platforms to take a more proactive role in e-customer security. Not just through technological solutions, but educating web users on how to recognize and avoid fraud.

Finally -s looking at the report as a whole- one can see the persistent challenges for e-commerce at least in terms of environmentally friendly solutions, and a strong information push. The latter should be in line with genuine, growing business efforts in being greener and more responsible, as well as accessible to customers of the entire industry.

# Highlights

- ▶ The Polish e-commerce market as socially responsible received a rating of 3.82 from e-buyers this year, compared to 4.23 a year ago. The EU market was again rated worse than the Polish market, receiving a rating of 3.47, and the non-EU market received a rating of 3.47, with the intercontinental market receiving the worst rating.
- In general, it can be seen that this year consumers are more critical of the ratings given - even the European market received lower marks, even though it had previously received similar ratings year-on-year.
- In the context of caring for the environment, the Polish e-commerce market received a score of 3.78, which is lower than a year ago (3.9), but the rating is almost identical to 2022.
- According to Internet users, it is Polish e-shops, not foreign ones, that are more active in responsible e-commerce (35% vs. 29%), but their advantage in the indications of Internet users is now much less clear.
- Respondents this year are less likely to believe that an environmental approach gives Polish businesses a competitive advantage (34%). Pro-environmental and pro-social policies are apparently already a “must-be” factor in e-commerce.
- E-commerce trade is now considered greener than in stationary stores by 30% of surveyed e-customers. While this represents a +4p.p. increase over last year, it still gives stationary stores a clear advantage.



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## WE INVITE YOU TO PARTICIPATE IN:

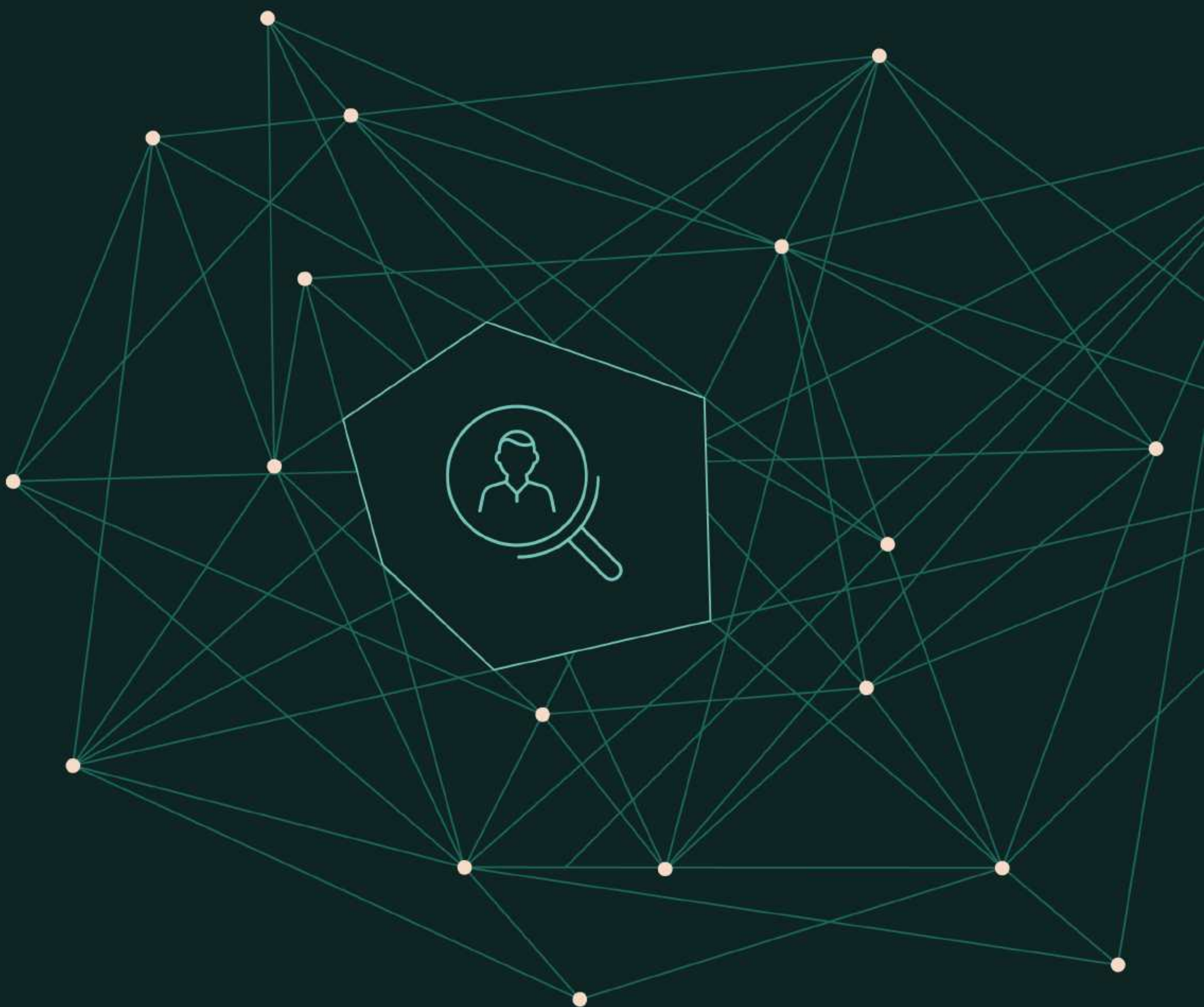
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# METHODOLOGY

∴ CHAMBER OF DIGITAL ECONOMY REPORT | 2024

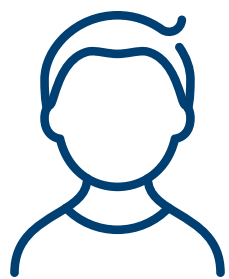


# Methodology

▶ Report based on a survey conducted by the Mobile Institute on behalf of the Chamber of Electronic Commerce. The survey was conducted in September/October 2024, using the CAWI (Computer-Assisted Web Interview) method - responsive electronic forms emitted on websites and in mailings.

The survey used the opinie.mobi survey system. Responses were collected from 1,794 Internet users and 555 representatives of e-commerce market companies. Only completely completed surveys were taken into account.

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



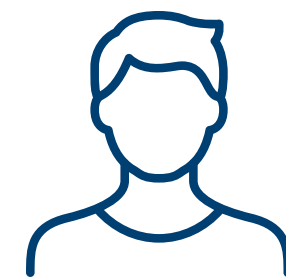
## Z GENERATION

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!

REPORT AUTHOR



RESEARCH AND ANALYSIS



CONTENT PARTNER



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