

# DELIVERING CHANGE

2022

E-shopper Barometer



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less but more  
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**GEOPOST**

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**Delivering Change**

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**Experts and interviewees:**

Jean-Claude Sonet  
Frédéric Bernard  
Thiemo van Spellen  
Carta Pereira  
Kerje Kivinum



**Carmen Cureu,**  
Market Research  
Director at Geopost

Carmen is a market research expert with 15 years of professional experience in the field. For the past six years, she has been in charge of market research and business intelligence at Geopost. The e-shopper barometer is a flagship survey at Geopost and Carmen has recently expanded it to include nine additional countries outside Europe.



**Katrin Dubreuil,**  
Writing

Katrin is an American expat who left California for France in 2001. She has spent most of her career in communication and has been a freelance copywriter for the past 10 years. Katrin frequently writes for Geopost, contributing to a variety of print and online production as well as providing social media content. To learn more about Katrin, visit her website ([katrindubreuil.com](http://katrindubreuil.com)) or her blog ([mot-juste.com](http://mot-juste.com)).



**Cyril Laroche,**  
Illustrations

Cyril has been a freelance graphic designer for the past 20 years. He has worked with Geopost for at least five years, providing a wide variety of visual content such as motion design and illustrations as well as graphic design including brochures, visual identity, charts, displays, and more. For more information about Cyril, visit his website ([gluandglu.com](http://gluandglu.com)) or follow him on Instagram (@Monsieur.laroche).

“Our 2022 e-shopper barometer truly delivers change, revealing the latest and most meaningful trends, while offering valuable analysis and insight into what the future may hold.”



**Jean-Claude Sonet**

EVP in charge of marketing, communication & sustainability Geopost

# THE ONLY CONSTANT IN LIFE IS CHANGE.

“The only constant in life is change.” As a good example, the global e-commerce market has experienced tremendous change over the past few years. Following decades of steady growth, the health crisis of 2020 was a watershed moment for the entire industry: shoppers turned to the Internet in droves, resulting in growth that far exceeded all expectations. Consequently, consumer habits underwent a dramatic shift, thereby cementing the importance of e-commerce and heralding a new hybrid mode of consumption. Dubbed ‘new commerce,’ this new approach represented a certain liberty from the logistic, economic, and technological restrictions of the past. Consumers freely combined online and traditional modes in a manner that best suited their personal tastes and preferences.

In the post-pandemic era, as society seeks to adjust to an unstable context, change remains as constant as ever. If anything, its pace has only accelerated, thereby bringing increased uncertainty as well as promising new opportunities.

Amidst all this change, consumer needs and expectations continue to evolve as well. How are e-shoppers responding to the economic context? What goods are they buying? What are their expectations, and are those expectations being met? Based on an in-depth analysis of almost 24,000 e-shoppers across 22 European countries, our 2022 e-shopper barometer truly delivers change, thereby revealing the latest and most meaningful trends while offering valuable analysis and insight into what the future may hold. ●



# DASHBOARD

– The five key takeaways of our 2022 E-Shopper Barometer:

- 1 Fresh food and beverage continue to thrive**  
The unprecedented growth of e-commerce over the past two years has given way to a post-pandemic adjustment period; however, some recent consumer behavioral changes persist. E-shoppers continue to buy an increasing number of categories online, with food and beverage and healthcare medicine solidifying their place among daily e-shopping habits.
- 2 Price consciousness is shaping consumer behavior**  
Against a backdrop of economic uncertainty, price plays a particularly powerful role in determining consumers' choices. This context is encouraging the growth of exchanges between private consumers, with both buyers and sellers increasingly convinced by the positive impact of customer-to-customer, whether as a source of less expensive products for buyers or as a means of additional revenue for sellers.
- 3 E-shoppers have higher expectations than ever**  
The overall satisfaction level for the e-shopping experience is positive. However, with e-commerce now firmly established as an everyday shopping behavior, European e-shoppers are becoming increasingly demanding. Their heightened expectations have resulted in a shopping and delivery experience that is perceived as less smooth, particularly for buyers of white goods and home appliances as well as fresh food and beverages.
- 4 Predictability is key to customer satisfaction**  
In terms of the delivery experience, predictability can make all the difference – being able to choose or at least know the one-hour window of the delivery is now among e-shoppers' prerequisites and is bound to drive purchases from a website offering such possibilities.
- 5 OOH solutions are gaining ground**  
Home remains the preferred delivery place, but out-of-home (OOH) solutions are increasingly utilized and expected. A growing number of regular e-shoppers prefer to be delivered via OOH and among them is an equal preference for parcel shops and parcel lockers.

## 35%

of regular e-shoppers ordered fresh food and beverage online in 2022.



## 69%

of regular e-shoppers are always on the lookout for a really good deal.

## 77%

of all Europeans are e-shoppers.

## 72%

of regular e-shoppers consider that the ability to select the day and exact one-hour time slot in advance of their delivery would make them more likely to purchase from a specific app or website.

## 7 in 10

regular e-shoppers are buying and/or selling on C2C platforms.

## DEEP DIVE: LESS BUT MORE



– The end of the pandemic and the macroeconomic headwinds have led to a slight adjustment in online purchasing. However, e-commerce retains its strong appeal for regular European e-shoppers who feel that they can buy almost everything online, as revealed by their very diverse shopping carts.

# SHIFTING HABITS

— Regular European e-shoppers remain convinced by e-commerce, in particular its stress-reducing and money-saving benefits. Moreover, while their impulse purchases have decreased, these shoppers are buying from more categories on average, with fashion in the lead. In terms of growth, fresh food and groceries remain strong even in the wake of the pandemic, while medicine and groceries products are on the rise.

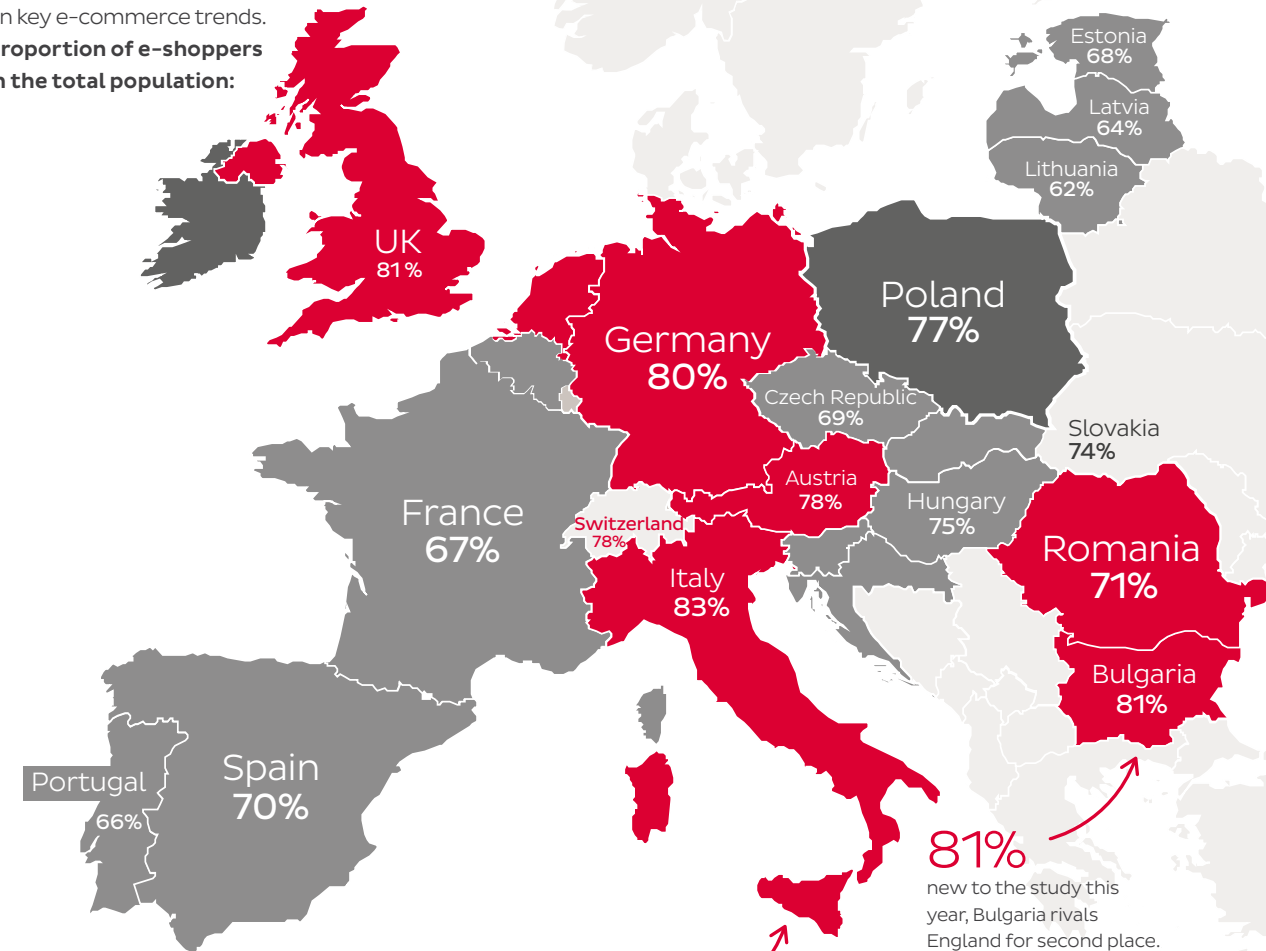
**As the world moves away from the pandemic, consumer habits are shifting as well.**

No longer a novel experience, e-commerce has become integrated into the lifestyle of European e-shoppers. When shopping online, e-shoppers believe e-commerce offers them a benefit that in-person buying does not. For many, that benefit is first and foremost cost, and then also convenience. Thus, the proportion of regular e-shoppers remains stable and represents almost one out of two e-shoppers. Regular e-shoppers clearly appreciate the deals that can be found online as well as the time they save and the stress they avoid by choosing this channel – an appreciation that has not changed even in the context of heightened economic pressure.

Among aficionados, the heavy buyers driving the momentum of e-commerce, the enthusiasm is still high, regardless of lower overall e-shopping. Like regular European e-shoppers, aficionados are buying from more categories online. But unlike regular shoppers, whose “pleasure” purchases (books, leisure, high-tech) have declined, aficionados remain unperturbed; they buy as much or more from all categories as they did previously. Shoes and fashion have long been favorite categories in e-commerce, and 2022 was no exception. Food, both fresh and groceries, has retained a solid momentum even as the pandemic fades, thereby proving that the category has successfully transformed its sudden 2020 explosion into a lasting consumer habit. Also noteworthy is medicine, which grew substantially, and beauty and healthcare, which grew as well. Ultimately, e-shoppers may have received fewer parcels this year. Yet, their tastes are more diverse than ever. ●



Country-wise zoom on key e-commerce trends. **Proportion of e-shoppers in the total population:**



### Did you know?

Aficionados purchased in 2022 more categories online than ever (8.8 categories on average). While they cite finding deals as a prime motivator for their shopping, experience shows that even when economic pressure increases, their buying continues to intensify.

**83%**

Italy gained five points in the past year, placing it in the lead.

**81%**

new to the study this year, Bulgaria rivals England for second place.

**69%**

of regular e-shoppers are always on the look-out for a really good deal.

**48%**

all e-shoppers are regular e-shoppers.

**77%**

of all Europeans are e-shoppers.

**87%**

of all online purchases are made by regular e-shoppers.





# FOOD IS BECOMING AN ESTABLISHED FAVORITE AMONG E-SHOPPERS

— After a swift rise to prominence in 2020 under the social distancing pressures of the pandemic, food has proven capable of maintaining its popularity among e-shoppers. In the post-pandemic context, the most powerful drivers of this momentum are primarily convenience-related.

**Fueled by the health crisis, the fresh food and beverage category experienced stupendous growth in 2020/2021.**

The category has proven to be remarkably resilient, and groceries, fresh food and beverage have remained strong. The convenience, time-saving and stress-reducing advantages of buying food online have convinced e-shoppers so much that in 2022 they continued to buy food online. Looking ahead, the fresh food and beverage category is likely to maintain its dynamism, providing numerous possibilities for further growth and development. ●

## Find out more

### Special edition: Food

What forces have propelled food to the front of the e-commerce scene? Why buy food online in 2022? Who are the buyers behind food's ongoing popularity? Discover all this and more in the special edition dedicated to food, available on 19 January 2023.



# 35%

of regular e-shoppers have ordered fresh food and beverages online since January.

# TOP TEN TYPES OF GOODS PURCHASED

— Despite a slight dip in overall purchasing, e-shoppers are buying from a wider range of categories than ever.





**Frédéric Bernard,**  
Director of Chronopost  
Healthcare

Credit: Hubert Raguet

# BEAUTY, HEALTHCARE, AND MEDICINE ON THE RISE.

— According to the latest e-shopper barometer, beauty and healthcare moved to third place in 2022, while medicine grew significantly. What can explain this success and how long might it last? Frédéric Bernard, Director of Chronopost Healthcare, shares his perspective.

**What factors can explain this growth momentum?**

Beauty and healthcare as well as medicine are progressing significantly. One clear explanation is the effect of the pandemic, which boosted the digitalization of the health sector and accelerated the development of online pharmacies. Lockdowns also greatly increased the number of online medical visits, and the purchase of medicine online is the logical next step to the online medical visit. For all these reasons, the overall e-health sector is experiencing strong growth.

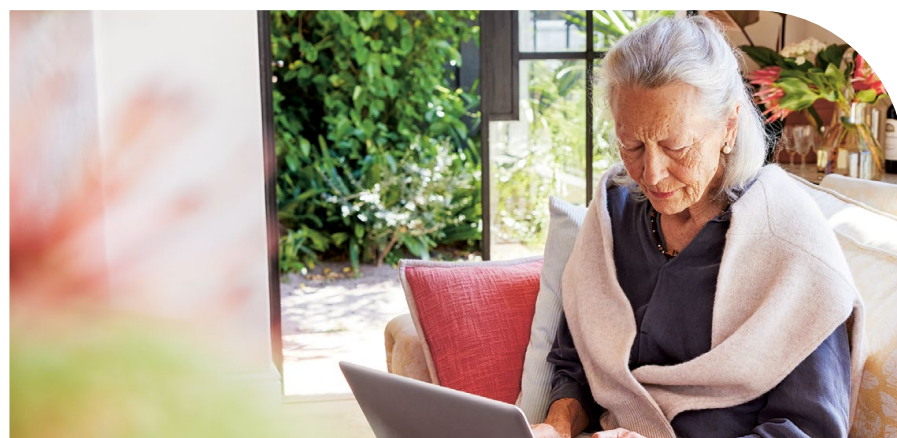
**The success of medicine as well as beauty and healthcare is not the same everywhere. Why not?**

Every country has its own legislation with regard to purchasing medicine

online and, thus, local particularities can explain the growth variations. On a more granular level, the sub-families of healthcare products, such as sunscreen or vitamins, necessarily have different growth rates as well.

**What is the short and long-term growth outlook for these categories?**

The transformation of the pharmacy sector is far from over. Globally, pharmacies will continue to consolidate and diminish in number, and digitalization will continue as well. The more this phenomenon grows, the more the online offering will expand and diversify, and the more sales will increase. This trend will continue and may even accelerate in the next few years, because we are only experiencing the beginning of the digitalization of the health sector. ●



**48%**

of regular e-shoppers have ordered beauty and healthcare products online since January.



“Lockdown increased the number of online medical visits, and the purchase of medicine online.”

# BUSINESS: THE RISING POWER OF PRICES.

— On account of the ongoing inflation, e-shoppers are proving to be more price-sensitive than in the past. Nevertheless, despite this heightened pressure, e-shoppers are diversifying rather than limiting the categories in which they buy online and are increasingly motivated to use the Internet to find especially good deals.

In reaction to negative economic conditions, e-shoppers are displaying greater price sensitivity than in the past and purchase levels have fallen slightly. However, this is true only of regular e-shoppers; aficionados are buying as much as they were. But even for regular e-shoppers, the decrease is moderate and involves primarily pleasure or impulse purchases, such as books, leisure, or high-tech / electronics. ●●●



**63%**

of regular e-shoppers consider that shopping online saves money.



Moreover, regular e-shoppers may be more prudent in their pleasure purchases, but they are showing greater willingness to expand their buying to a greater range of product categories than they did previously. This tendency toward diversification is also true of aficionados, who remain heavier buyers who are expanding to new product categories.

All families of e-shoppers are expressing increased price sensitivity, even if finding deals online has historically been among the most frequently cited motivating factors for e-shoppers.

More than ever, both regular e-shoppers and aficionados are expressing the desire to find really good deals as a major reason to purchase online.

Driven by budget control and the search for a more sustainable, more circular economy, e-shoppers are embracing second-hand customer-to-customer transactions on a massive scale; in the past year, 70% of regular e-shoppers used a C2C platform, whether as buyers, as sellers, or as both. Among aficionados, the figure is even higher: 79% buy or sell products on C2C platforms.



### Why buy on C2C platforms?

For regular e-shoppers, the chief reason to buy products on customer-to-customer platforms is price: 64% say that it is more affordable than buying new products. The environment is also an important factor: for 33%, C2C supports a sustainable economy. Other reasons include supporting small retailers and the reassurance of buying directly from private individuals.

### A closer look at aficionados

Even more convinced than regular e-shoppers that shopping online saves money, aficionados are also on the hunt for good deals despite not being anymore sensitive to prices than they were earlier.

**68%** consider that shopping online saves money.

**62%** believe that price is the most important purchase factor.

**61%** look forward to big discount events, whether online or offline.



**74%** are always on the lookout for a really good deal.

# IS CUSTOMER-TO-CUSTOMER THE NEW NORMAL?

– C2C platforms are experiencing unprecedented popularity; a third of regular e-shoppers claim that they buy more on these platforms than they did earlier. Those who engage in C2C commerce do so rather frequently, with 44% saying they buy at least once per month.

E-shoppers purchase from individuals mainly because it is less expensive than buying new products.

The fact that C2C is an alternate means to consume more responsibly is of secondary importance and is mentioned by only a third of regular e-shoppers. Regular e-shoppers who sell on these platforms also seek to save some space in their homes, and this new e-commerce method allows them to get rid of unused items while earning some extra money. Perhaps unsurprisingly, aficionados appreciate C2C platforms even more than regular e-shoppers, with 58% stating that they buy at least once per month. Saving money and space are also the top motivating factors for aficionados to sell online, but these e-shoppers also appreciate the ability to buy from small retailers through C2C platforms.

**34%**

of regular e-shoppers agree or strongly agree with the assertion, "I buy more second-hand products these days."



### Did you know?

Social networking for shopping purposes is a common practice among social media users: 70% use social media for at least one shopping purpose, such as finding shopping inspiration or information, shopping from recommendations, and also to shop directly.



**70%**

of regular e-shoppers are C2C platform users, either as buyers, sellers, or as both buyers and sellers.

# SOCIETY: GREAT EXPECTATIONS

— As e-commerce has evolved from being a novelty to a bona fide retail channel, consumers' expectations have steadily grown and are likely to continue to do so.



**Thiemo van Spellen, Global Accounts**  
Managing Director Geopost

How have e-shoppers changed over the past few years and what factors are driving their decision to buy or not buy online? Thiemo van Spellen, Global Accounts Managing Director, explains:

**How have consumer's expectations in e-commerce evolved over the past five years and what are the principal expectations that today's consumer share.**

According to the results of the 2022 e-shopper barometer, consumers are buying slightly less than in previous years. This is largely due to the economic effects of the war in Ukraine, rising prices, and inflation. However, consumers may be buying less overall, but they are buying from a wider variety of categories. The online basket continues to diversify and now accounts for six categories bought on average. It is interesting to see that the three categories which emerged during the COVID-19 pandemic are now part of the common online basket: fresh food and beverage, groceries, and medicine. On the other hand, the economic criteria can explain the decrease in other categories such as books, high-tech and leisure;

for example, high-tech items are long-lasting goods that do not require to be purchased on a regular basis. As e-commerce becomes increasingly common, e-shoppers' expectations have continued to rise. Today's e-shoppers expect a smooth buying experience, swift and reliable delivery, the ability to track their parcels, and the liberty to decide when and where the parcels will be delivered.

**What are the key drivers that encourage consumers to keep buying online?**

Not having to pay for the delivery remains the chief driver of online purchases, followed by not having to pay for returns and no hidden fees. Delivery-related criteria are growing in importance, including the choice in the speed of the delivery and the ability to be told the exact one-hour delivery time slot.

**What are the barriers to further e-commerce growth? How and where can consumer satisfaction be improved?**

The greatest barriers to online shopping are having to pay delivery fees, delivery taking too long, and negative opinions of fellow shoppers on social media. Delivery services, particularly those related to precision and selection, are increasingly appreciated by e-shoppers. Providing a variety of reliable services that deliver on their promises could be a powerful means of improving customer trust and satisfaction. ●

## 60%

consider that having a choice of sustainable delivery options is important when buying online.

## 64%

would be more likely to select an app or website that has sustainable delivery options.

Among the top 10 important criteria when buying online, in first place, by far, is not having to pay for the delivery at **40%**, followed by not having to pay for returns at **27%**, and no hidden fees at **22%**.

# WHEN SUSTAINABILITY BECOMES A MAJOR CRITERION.

— The pandemic accelerated a pre-existing trend toward heightened ecological awareness among consumers. Today, sustainability has become a deciding factor in e-shoppers' choice of both retailer and delivery methods.

Consumers care about the environmental impact of their purchases, which includes delivery. For six out of ten regular e-shoppers, sustainable delivery options are important, even if the degree of importance is slightly lower than it was last year. In their minds, more sustainable options imply, above all, being delivered by low-emission vehicles, with several products being combined and delivered together rather than multiple separate deliveries on different days. ●

## Who are the regular e-shoppers?

Representing almost one out of two e-shoppers in 2022, regular e-shoppers make 15.4% of their total purchases online and account for the majority of all online transactions. Despite increased price sensitivity, regular e-shoppers remain steadfastly convinced by the benefits of e-shopping. Many cite the convenience, stress-reducing, and time-saving benefits of e-shopping as reasons why they continue to buy online.





# TRAVEL BREAK: CROSS BORDER SHOPPING IS SET TO LAST

## Did you know?

Despite a slight decline vs. 2021, cross-border e-shopping remains popular among regular e-shoppers – over half have already made a purchase on a foreign website. More than ever, these shoppers favor the European continent and its vendors, with fewer buying from China.

**57%** of regular e-shoppers have already made a purchase on a foreign website.



Top 3 most common foreign countries for online shopping



China  
51%



USA  
32%



Germany  
29%

## Why buy from a foreign website?

- 1 Product availability**  
Cross-border e-shoppers cite the availability of products and/or brands that are locally unavailable among their chief reasons to buy abroad.
- 2 Better deals**  
On par with product availability, the belief that they will likely find better deals abroad is a powerful motivator for regular e-shoppers to engage in cross-border shopping.
- 3 Transparency**  
On the rise this year, easier and more transparent delivery and/or return options comes in third place in pushing e-shoppers to try foreign websites.
- 4 Language**  
The ability to speak the local language of the foreign website is increasingly becoming a reason for regular e-shoppers to buy abroad.



Regular e-shopper: purchases from foreign countries

**44%**  
from neighbouring countries.

**63%** from other parts of the world. **75%** from Europe.



# TECH: THE PREDICTABILITY FACTOR

— When it comes to delivery, predictability continues to gain importance in e-shoppers' minds. Being informed regarding the exact one-hour delivery time slot and the ability to choose the specific day/time of delivery are more important than ever.



73%

of regular e-shoppers received advance delivery notification via email or SMS.

69%

of regular e-shoppers consider that knowing the exact one-hour delivery window of their purchase would make them likely to shop from a specific app or website.

72%

of regular e-shoppers consider that the ability to select the day and exact one-hour window in advance of their delivery would make them more likely to purchase from a specific app or website.

For the second consecutive year, fewer e-shoppers consider their online purchase and delivery experiences to be easy. This decrease is particularly evident among those who bought white goods and home appliances or fresh food and beverages. While higher expectation is problematic – particularly when this leads to negative reviews – after purchasing, the decrease is likely due to two principal causes. First, e-shoppers' overall expectations are at an all-time high, and this extends to delivery. Regular e-shoppers are placing ever more importance on delivery services, thereby demonstrating a growing desire to manage and personalize their delivery experience as much as possible. Specific services such as delivery on a particular day and a pre-selected one-hour time

slot, as well as delivery within one to two hours after ordering online, have both increased since 2021; the foremost delivery preference among regular e-shoppers is real-time delivery information. Second, those who faced difficulties during their last purchase were primarily younger and more recent e-shoppers who purchased from websites that they did not know of, which may explain why they perceived the experience as requiring extra effort.

The reasons for this group's dissatisfaction with their last delivery are primarily related to time slot, absence of notifications, tracking issues, or delivery location. Therefore, the two principal causes of higher expectations in the delivery experience both

underscore the key role that predictability-related delivery services can play in ensuring customer satisfaction, provided these services deliver on their promises. ●



2020

Léa  
When will my parcel be delivered?

Théo Assistant DPD  
You can select a four-hour delivery window for your parcel. Would you like to pick a day and time slot?

Léa  
Yes, thanks!

2022

Léa  
I need to know exactly when my parcel will be delivered.

Théo Assistant DPD  
No problem! You can select a one-hour delivery window for your parcel.

Léa  
That's great, thank you!







# HABITS: THERE'S NO PLACE LIKE OUT-OF-HOME

— Convenience is central to the ongoing success of e-commerce. In terms of delivery, consumers increasingly choose the option that is most convenient for them, which is often the option closest to home.

- 48%** of regular e-shoppers usually use more than one delivery location.
- 71%** of regular e-shoppers consider it important to know the name of the delivery company.
- 39%** of regular e-shoppers choose out-of-home delivery.

With e-commerce having become a fully integrated lifestyle habit in Europe, e-shoppers want and expect deliveries that blend seamlessly into their lifestyle, offering them an array of flexible and convenient options.

Thus, while the preferred delivery location has long been the home, the popularity of out-of-home alternatives has steadily grown over the years, increasing by four points in 2022 compared to that in 2021.

E-shoppers are also using a greater variety of delivery locations, on average, further reflecting their desire for solutions that can keep pace with their lives. Among the wide array of available solutions, parcel lockers and parcel shops lead the way, followed by work address, post office, or in-store. But regardless of the delivery location, knowing the name of the delivery company is becoming increasingly important for regular e-shoppers, whether for greater peace of mind, the guarantee of good service, or because of personal preference. Knowing the name of the delivery company ahead of time is even more important to aficionados e-shoppers (78%), particularly for the reassurance that such knowledge provides. ●



## Out-of-home delivery in Portugal and in Estonia.

“I believe that in the coming years, more and more Portuguese people will be using out-of-home delivery solutions, be it lockers or Pickup points. Just think of a family that goes on holiday and does not have the possibility of receiving their parcel at home, choosing to collect it in a locker or store close to their accommodation instead. Or even a person who works from 9 am to 6 pm in the office, and who has the possibility to pick up their parcel at a pick-up point close to their place of work. There are endless examples that justify the growing relevance of these delivery solutions. Therefore, delivery must encompass a wide range of solutions, from home delivery to out-of-home, so one can choose the most convenient one.”

**Carla Pereira, Marketing & Communication Director, DPD Portugal**

“Estonia is in the top ten in innovation across the European Union (the European Innovation Scoreboard, 2021). This is also reflected in consumer expectations and choices for innovative and convenient new solutions. Estonians like to try out new digital solutions, and because of that we are very open to integrating technology into daily life. Flexibility, easily accessible locations, and fast delivery are what Estonian e-shoppers value the most about parcel lockers. Customers can both pick up and send their packages at the most suitable time and place for them, and DPD lockers are open 24/7. Smart, convenient, and sustainable solutions are highly appreciated among Estonians and the lockers are used by people of all ages.”

**Kerje Kivinurm, Marketing Team Lead, DPD Estonia**



**23,974**

participants across 22 European countries.

between

**800 & 1526**

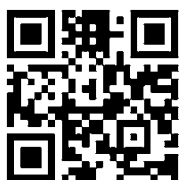
participants were interviewed per country.

# IN-DEPTH ANALYSIS

The 2022 Geopost e-shopper barometer report is based on fieldwork conducted from May 30, 2022 to July 26, 2022.

The data for this report were collected through blind (blind: interviewees are unaware of who requested the study, with no mention of specific e-tailer or carrier brands) online interviews with 23,974 participants across 22 European countries (Austria, Belgium, Bulgaria, Croatia, Czech Republic, Estonia, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Switzerland, and the UK).

Between 800 and 1,525 participants were interviewed per country. All participants, aged 18–70 years, had made at least one purchase online (any type of physical goods), followed by a delivery, since January 2022. The sample is representative of the national population in terms of age, gender, and SEC in each country. For the consolidated results at the European level, a weight was applied to each country in order to reflect the correct proportion of e-shoppers in the European countries. ●



Find out more  
The full report is available online at [Geopost.com](https://www.geopost.com)

# SPECIAL FOOD EDITION

— After two years of explosive growth, the fresh food and beverage category is proving its ability to maintain its powerful appeal even in the face of a challenging macroeconomic context.



**Drivers and barriers:** Discover the factors that are shaping the future of the food and beverage category.



**Delivery:** Food delivery comes with its own set of challenges. Find out what today's food and beverage e-shoppers expect from their deliveries.



## Bon appétit

What kinds of foods are e-shoppers buying online? We'll tell you all about it!





Find out more  
on our website:  
**Geopost.com**

Keep in touch with  
us next year to find  
out more about the  
latest e-shopping  
trends.

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## 2022 E-shopper Barometer



  
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