Next – Commerce

The future of ecommerce in Spain

IESE Business School Universidad de Navarra · Veepee · KANTAR

Executive Summary (I)

Ecommerce has redefined the retail world. In Spain, 49% of shoppers say that their **online purchases have increased** in the last year, reflecting the upward trend of the online channel.

But what are the keys to understanding this success? Today's ecommerce is based on three main pillars: **convenience, price and variety**. Results reveal that 59% of buyers feel that online shopping is **more convenient**, while 47% believe there are more **discounts and promotions**. Additionally, 44% of shoppers agree that there is a **greater variety of products**. And **marketplaces** respond very well to these needs.

The purchasing process is divided into **three distinct phases**:

Before the purchase, up to 73% of **Spanish consumers seek for information** about the purchase they are going to make, so it is essential to be able to offer it to them. It is also important to be present in their minds, offering them information about our products or promotions, among others, but **without being too invasive**: **email, with an appropriate frequency**, becomes the perfect way to achieve this.

During the purchase, the Spanish shopper is **mainly single-channel**, although there is a trend towards the integration of physical and digital. **Price** is a very important driver for them, as it is the **first thing they look at** when buying online: up to 60% of Spanish shoppers sort products on the page by price. Compared to other European regions such as Benelux or France, they are **more frequent shoppers** and more open to **categories such as fashion or technology**.

When it comes to paying, **credit card** (75% of users) and **digital wallets** such as Google Pay, Apple Pay or PayPal (50%) are a requirement. They are **not as likely to finance their online purchases** as in the rest of Europe, but still 1 in 3 shoppers do so. Still related to price, shipping is a crucial part for those buyers: 61% recognize that it is **important to be able to choose a free delivery option**.

After the purchase, it will be key that the **product meets their expectations** or else up to 79% will return the order, even if they are not particularly comfortable with it.

Executive Summary (II)

With an eye on the future, **innovation** is going to be key to make it even easier for online users. There is still a great opportunity to surprise them, as 4 out of 10 online shoppers have not experimented with new technologies (AI, AR, voice shopping...) during their shopping process. However, shoppers are curious about them: up to 67% of shoppers say they are **interested in what these technologies have to offer**. These technologies can be particularly useful in providing a **better understanding of what the product to be purchased is like**, for example, through 360º photographs or the possibility of seeing the product in augmented reality.

Another of the basic pillars of eCommerce for the future is sustainability, understood as a **commitment to the equal development of society and care for environment**. eCommerce is perceived as a facilitator for this, and 43% of Spaniards say that online shopping has helped them to make **more sustainable purchases**. Compared to other European countries, **Spanish people pay more attention to social reasons**, such as ensuring that the brands they buy do not exploit children or that their workers have good working conditions.

Second-hand is a market that also has its place among Spanish online shoppers: **half of them** declare they have bought and sold second-hand products in the last year, with **fashion** being the category with the highest acceptance in this market. However, beyond caring for the planet, for them second hand mainly responds to **personal economy improving**.

Contents index

Today's ecommerce

Future of ecommerce: challenges and opportunities

01
Introduction & methodology

02
Purchase Process

03
How marketplaces respond to consumer needs

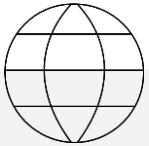
04
Sustainability and online shopping

05
Innovation and ecommerce trends

06
Key takeaways

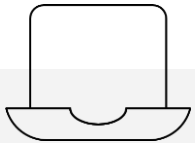
01 Introduction & methodology

Methodology



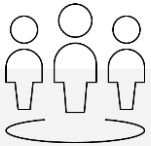
Target

- Individuals 16 to 65 years old, who have made an online purchase in the last year, and living in Spain, France, Italy, Belgium or the Netherlands.
- N^{total} = 5001 interviews (N^{Spain} = 1000 interviews)



Technique

- Computer-Assisted Web Interview (CAWI)
- Quotas by gender, age and region to ensure sample representativity



Fieldwork

- Fieldwork was conducted between March 27th and April 11th.

The error margin for overall results per brand (n=1000), if the sample had been selected by random pure method, would be of ± 3,16% in case of maximum indetermination (p=q=50 %) and under a confidence interval of 95%.

Targeted countries

Spain

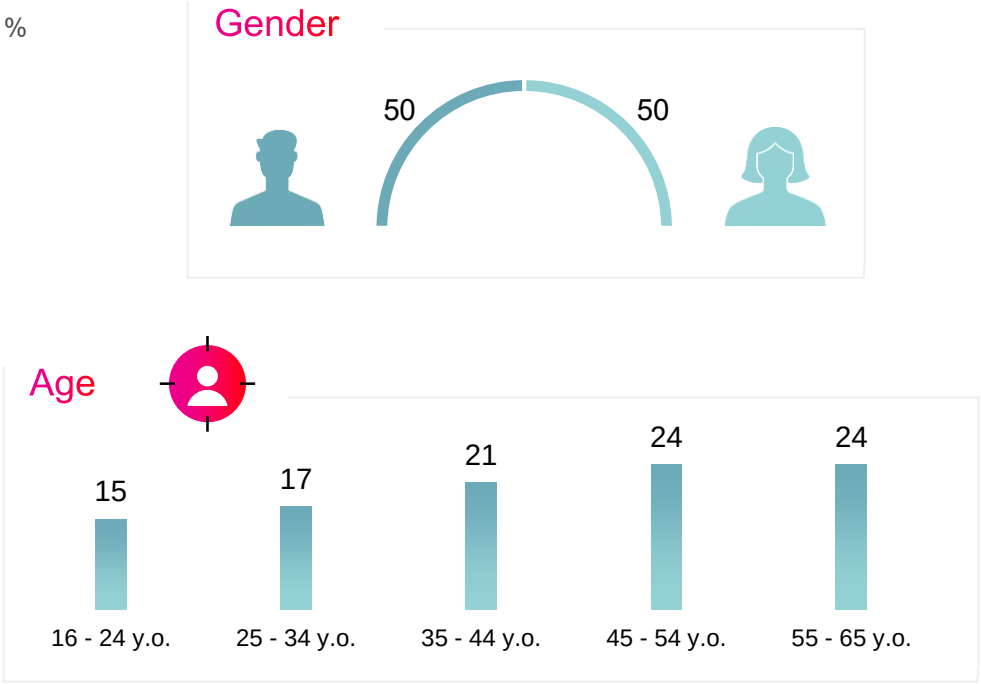
Italy

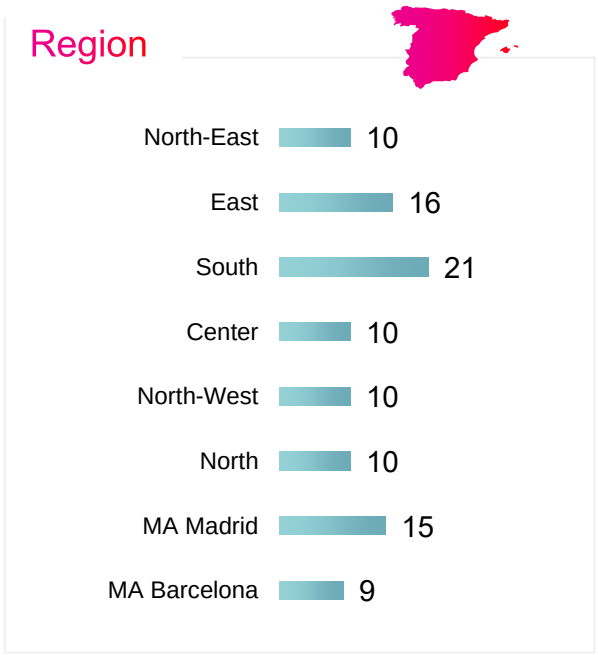
France

Belgium

Netherlands

Sample distribution



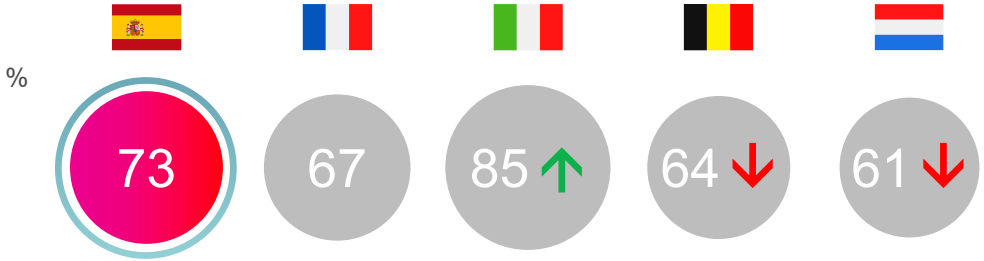


Base: Total (1000)

Q3. Which gender do you most identify with? / Q4. How old are you? / Q6. Where do you live?

How to read these results?

To provide a more complete picture, we have compared the results against the average of the 5 countries involved in this study. Thus, the symbols ↑ / ↓ represent a significantly higher or lower value compared to this average at a 95% confidence interval.



70%

The average of the 5 countries is also included for the main variables

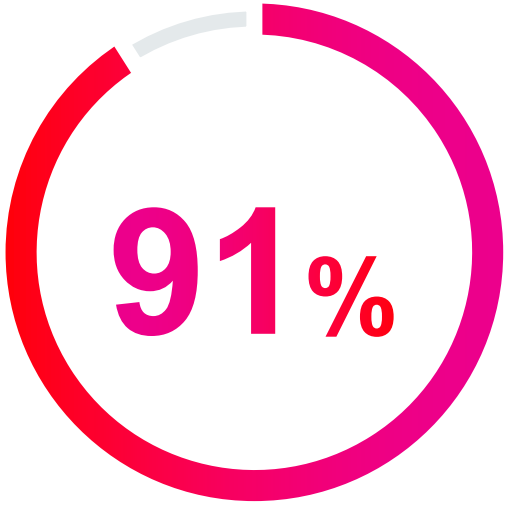
Today’s ecommerce

02 | Purchase Process

We are facing a new reality

Kantar Knows

KANTAR



of shoppers state that online shopping has changed the way they shop physically

Ecommerce has redefined the retail world.

Shoppers expect brands to deliver a world of global experiences in a connected world…

And we must be ready to enter the **third era of digital retail**

Source: Kantar

49% of Spanish population has increased its online purchases

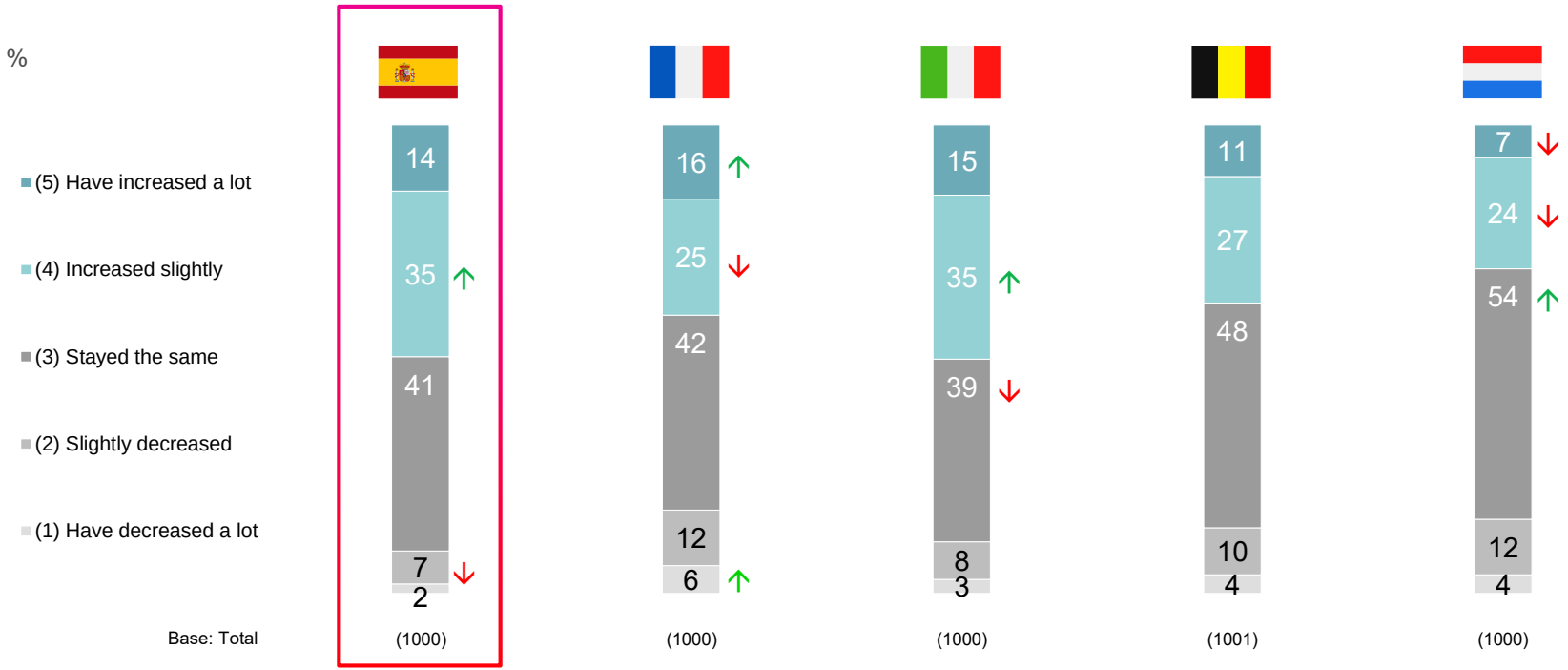
% Have increased a lot + slightly

42%

Base: Total (1000)

Q20. Compared to the previous year, do you consider that your online purchases this year… (Have increased a lot / Increased slightly / Stayed the same / Slightly decreased / Have decreased a lot)

In fact, Spain, along with Italy, shows the largest increase in online purchases in the last year.



Q20. Compared to the previous year, do you consider that your online purchases this year… (Have increased a lot / Increased slightly / Stayed the same / Slightly decreased / Have decreased a lot)

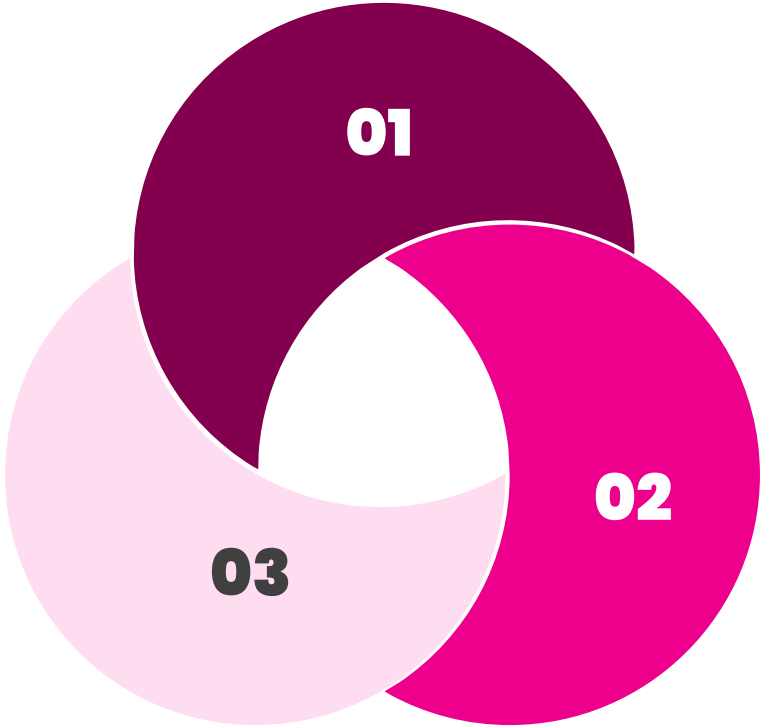
Today’s ecommerce: online purchase drivers

Spanish shoppers embrace the digital channel to make their purchases, based mainly on three pillars: convenience, price and variety.

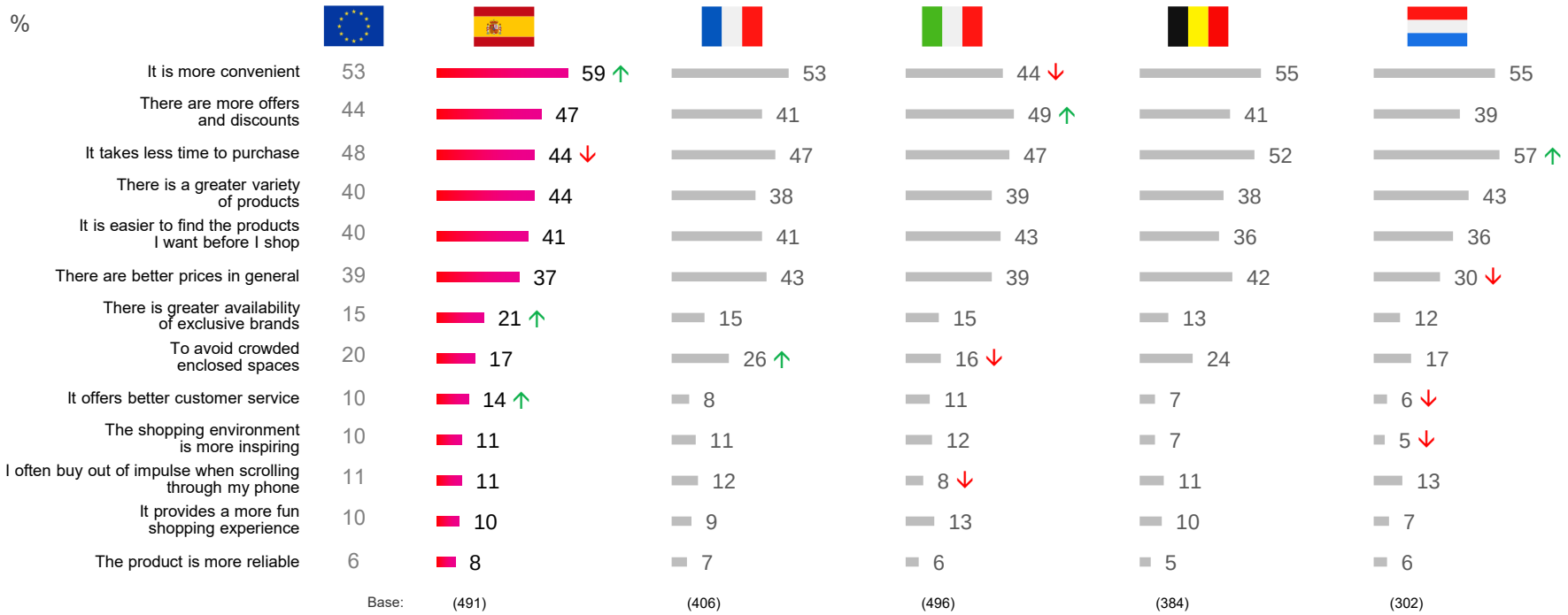
01. Convenience
These are faster purchases, which can be made from any location and where it is easier to find what they are looking for.

02. Price
There is greater availability of offers and the prices offered are more competitive compared to the physical environment.

03. Variety
Not only is there a greater variety of products in general, but there is also a greater availability of exclusive products.



They have increased online shopping because it offers convenience, better prices and greater variety



Q21. And what are the reasons you have increased your online purchasing?

We like to trust: the recommendation of a family member or a friend is the most influential factor when it comes to buying online.

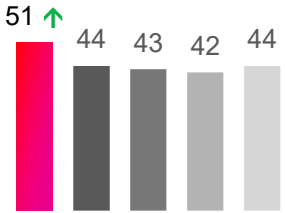
%

51	Recommendations from a family member or acquaintance
40	Advertising or products that I have seen in a physical shop
32	Advertisements in catalogues and magazines or TV
30	Social media ads
17	Recommendations from an influencer in social media

Base: Total (1000)

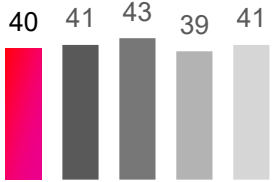
Q27. Which of the following aspects have inspired you to buy something online?
Either because they have given you an idea, introduced you to a new product, or you just found it interesting

Detailed Insights – Purchase Process Influence



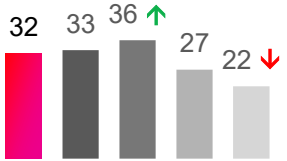
Recommendations from a family member or acquaintance

45



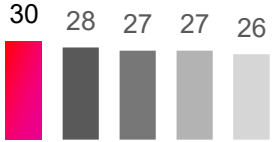
Advertising or products that I have seen in a physical shop

41



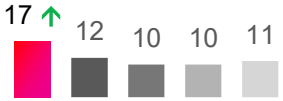
Advertisements in catalogues and magazines or TV

30



Social media ads

27

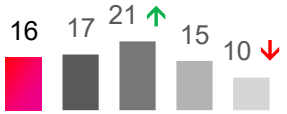


Recommendations from an influencer in social medial

12

Products that I have seen in series/movies

12



Reading press articles

16

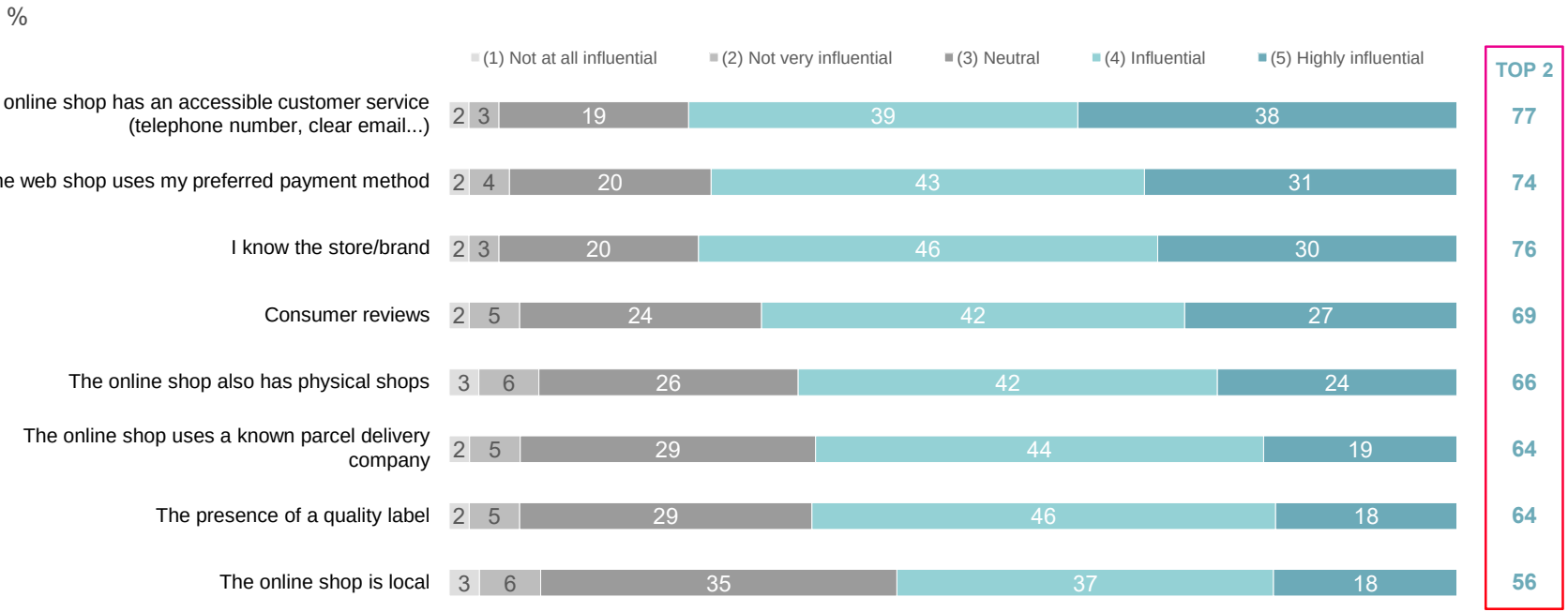
Viral challenges on social media (e.g. #TikTokMadeMeBuyIt)

8

Q27. Which of the following aspects have inspired you to buy something online?
Either because they have given you an idea, introduced you to a new product, or you just found it interesting.

Trust is key for the online shopper and an easily accessible customer service is the key to build it

Local Question

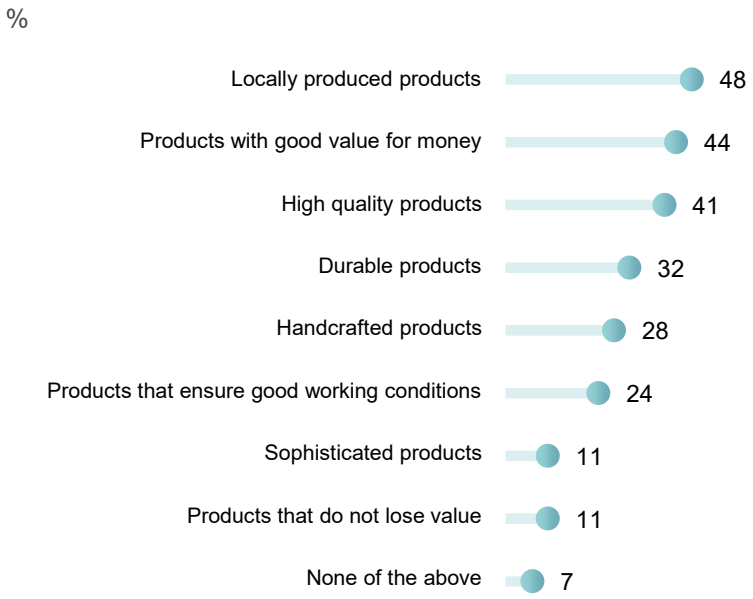


Base: Total (1000)

Q54. To what extent do the following factors positively influence your confidence when shopping online?

Take advantage of Made in Spain: they meet all these needs as they are high-quality products and offer a good value for money.

Local Question



Base: Total (1000)

Q56. How do you perceive products **made** in Spain?

Purchase process

3 main steps

1.

2.

3.

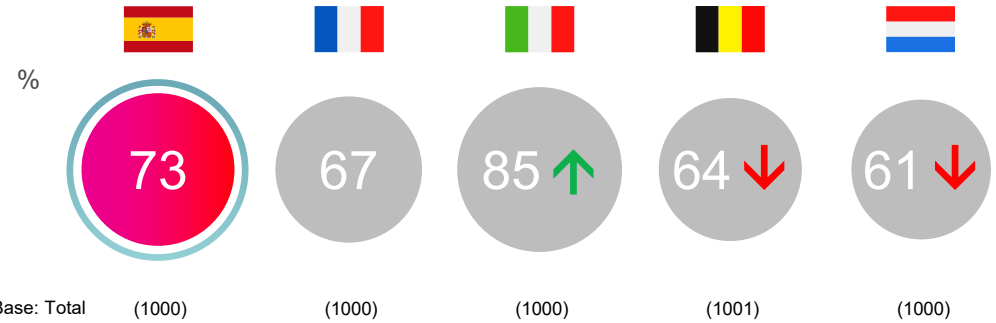
Before the purchase

- Information they seek
- Touchpoints to keep them informed
- Filters they use

During the purchase

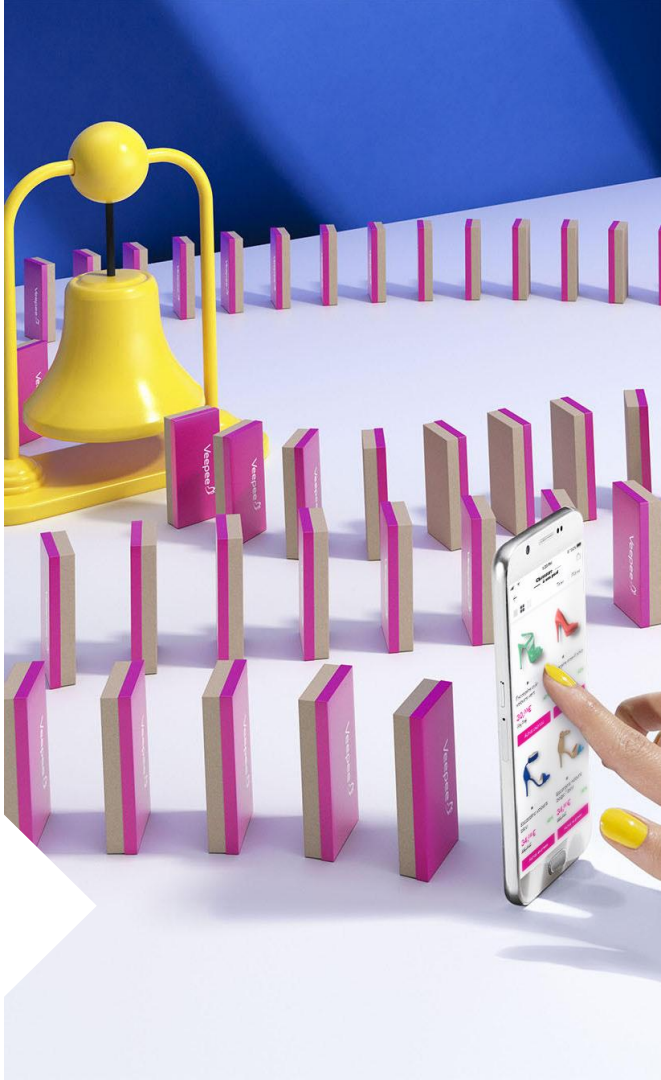
After the purchase

73% of Spanish consumers seek information before buying a product online

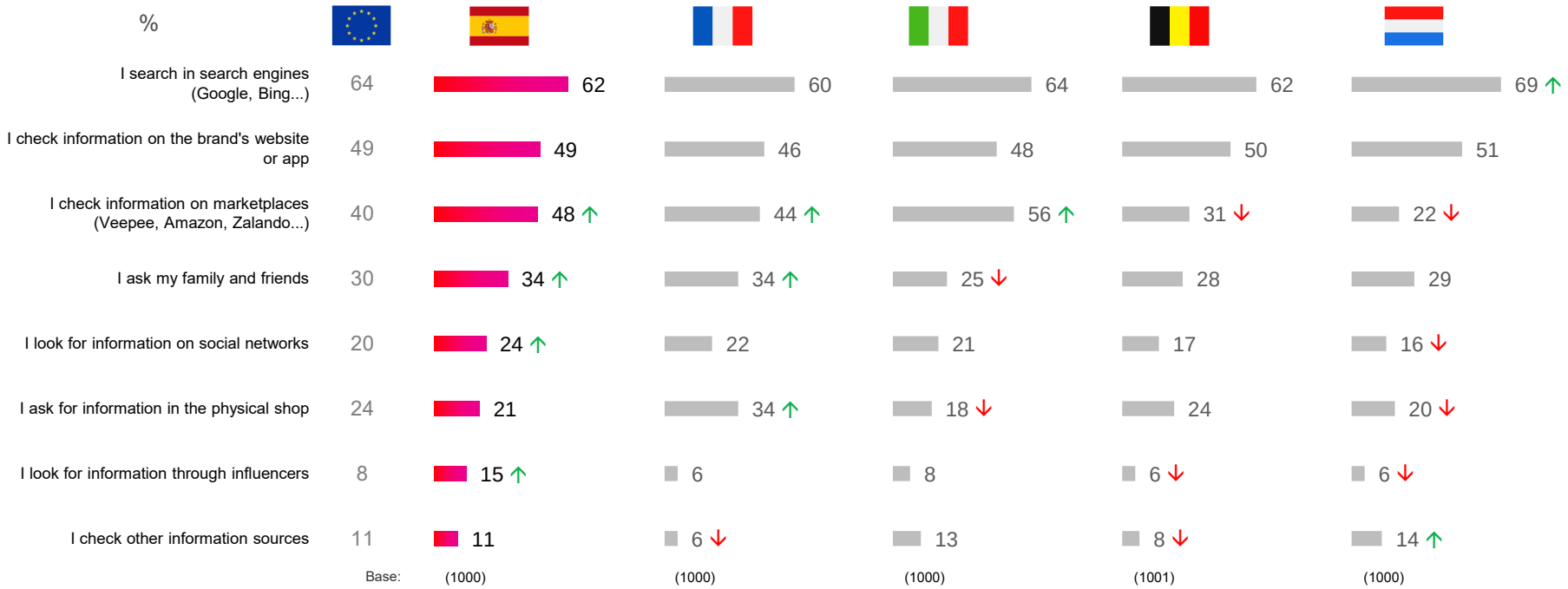


70%

Q23. Before making an online purchase, do you look for information about the product/service you are going to buy (compare prices, check reviews...)?.



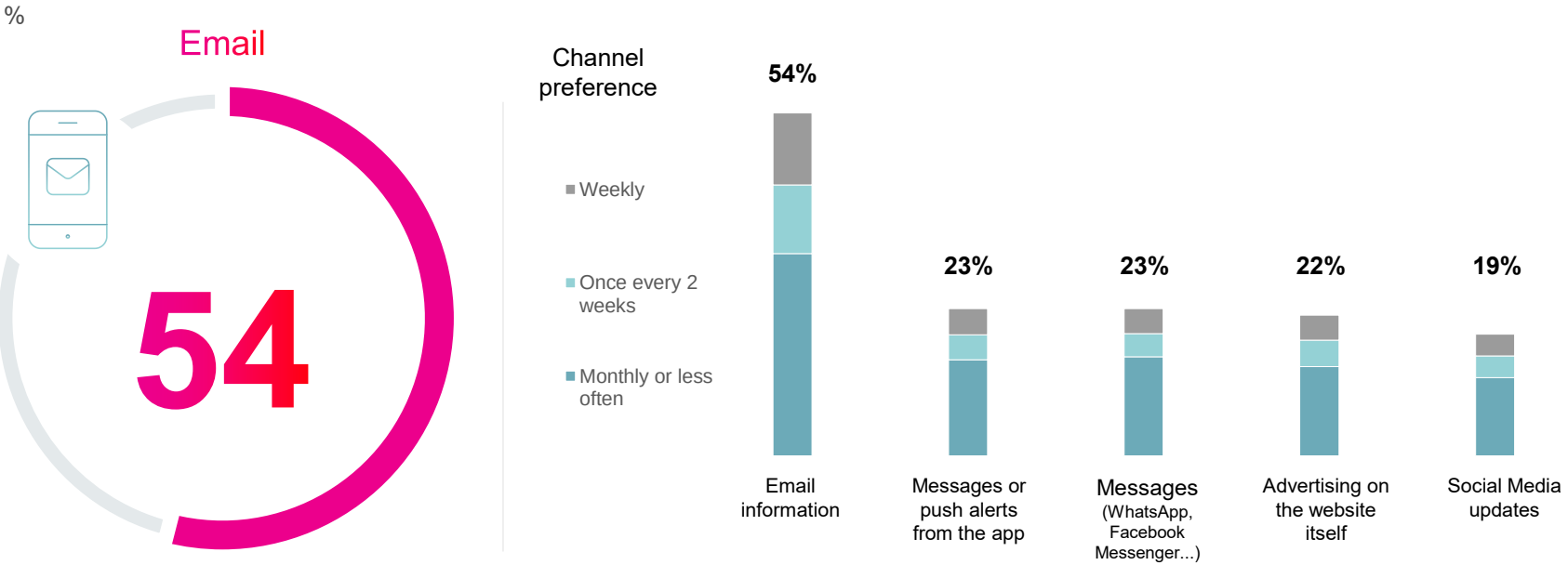
Search engines are the main source of information, although the online shopper also largely consults the brand's website and the marketplaces where the brand is offered.



Q24. Which of the following sources of information do you check before making an online purchase?

Email is the preferred information channel, but consumers would prefer not to receive notifications more than once a month

Local Question



Base: Total (1000)

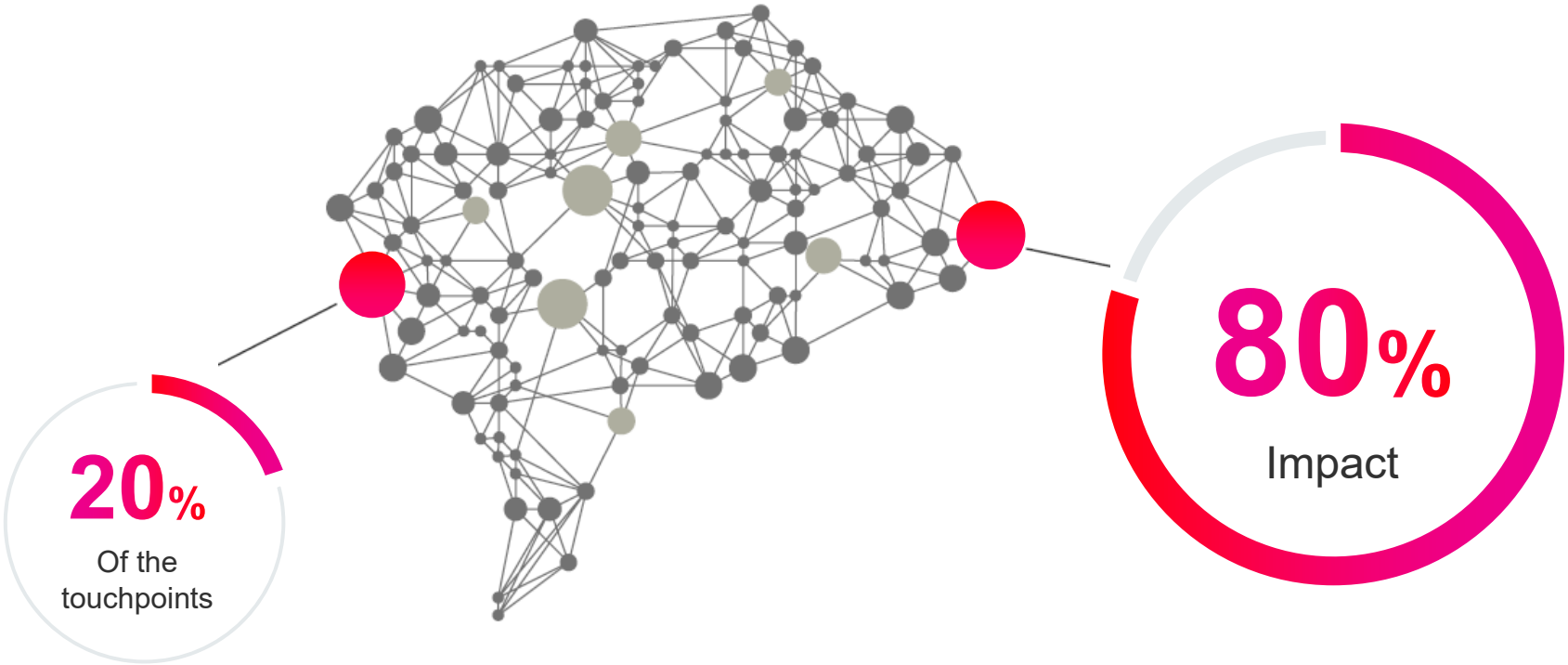
Q52. How do you prefer to receive information about the website where you have made an online purchase (new products, promotions...)?
Q53. And how often would you like to receive new information on each of these channels?

A buyer overloaded with information which is... relevant?

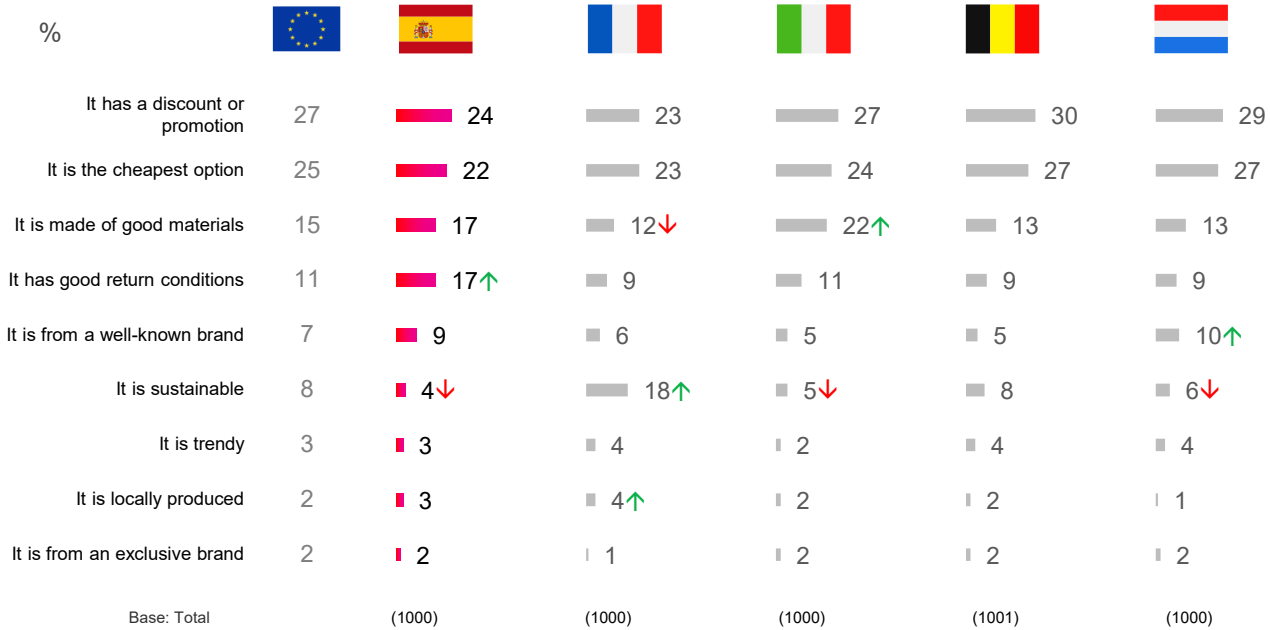
Information converts into sales only if it is perceived as relevant

Kantar Knows

KANTAR



Source: Touchpoint benchmark conducted in more than 20 countries and 50 categories by Kantar



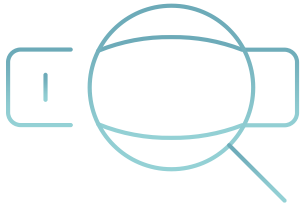
%	EU	Spain	France	Italy	Belgium	Netherlands
It has a discount or promotion	27	24	23	27	30	29
It is the cheapest option	25	22	23	24	27	27
It is made of good materials	15	17	12↓	22↑	13	13
It has good return conditions	11	17↑	9	11	9	9
It is from a well-known brand	7	9	6	5	5	10↑
It is sustainable	8	4↓	18↑	5↓	8	6↓
It is trendy	3	3	4	2	4	4
It is locally produced	2	3	4↑	2	2	1
It is from an exclusive brand	2	2	1	2	2	2
Base: Total		(1000)	(1000)	(1000)	(1001)	(1000)

Q25. When you buy a product online, the first thing you look for is that...

When it comes to online shopping, the European consumer is sensitive to price.

In Spain the quality of the materials and the return conditions also play an important role in their decision.

Price is important: up to 60% of Spanish online shoppers use it to filter products when buying online.



% Always + Almost every time

	Spain	EU
I sort the list of products by price	60	60
I filter by size ↑	54	47
I filter by products that have a promotion/special offer	48	45
I sort the list of products by best rating	37	36

Base: Total (1000)

I sort the list of products by price	58	
I filter by category	50	
I filter by size	49	

(1000)

I sort the list of products by price	69	↑
I filter by products that have a promotion/ special offer	59	↑
I filter by category	62	↑

(1000)

I sort the list of products by price	56	↓
I filter by category	51	
I filter by size	51	↑

(1001)

I sort the list of products by price	59	
I filter by size	56	↑
I filter by category	52	

(1000)

Q26. When shopping online... (Always / Almost every time / Occasionally / Practically never / Never)

Purchase process

3 main steps

1.

Before the purchase

- Information they seek
- Touchpoints to keep them informed
- Filters they use

2.

During the purchase

- Channel
- Key elements they pay attention to
- Type of product they buy

3.

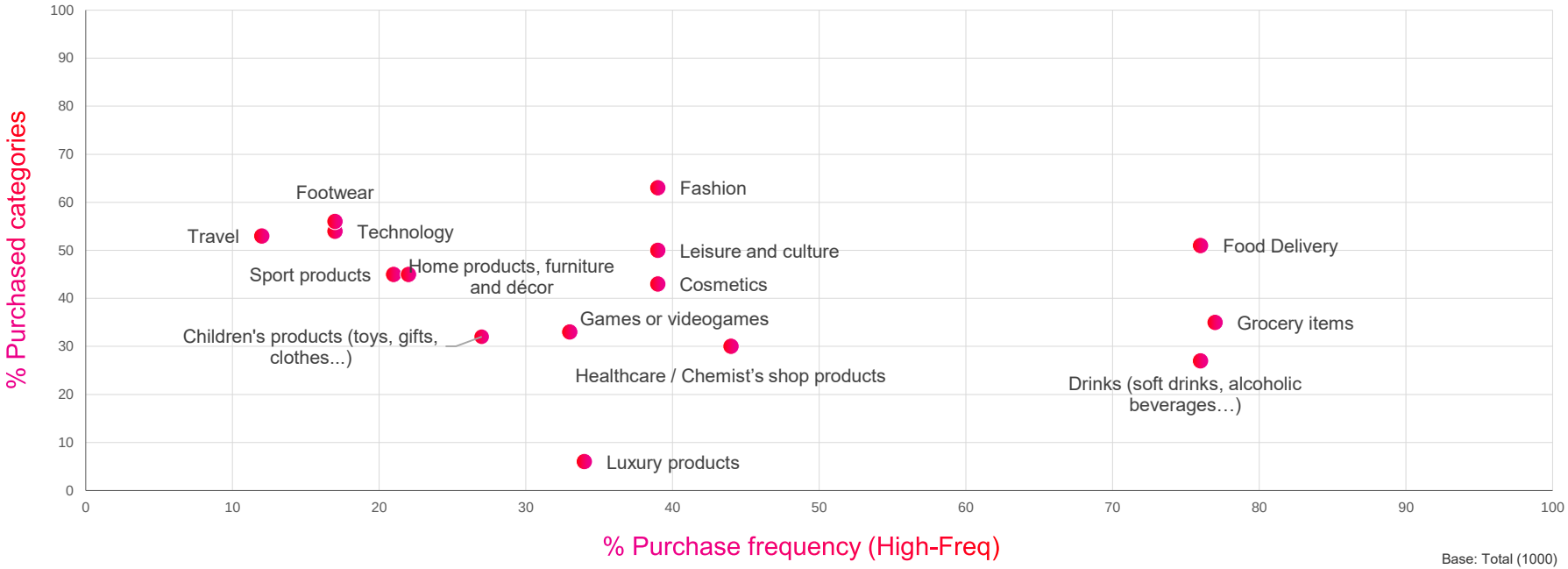
After the purchase

Consumers are single-channel: they generally look for and buy products in the same store, whether online or physical.

% Always + Almost every time						
I go to the physical shop to buy the products I need	54	52	53	55	56	52
I look for the products in the online shop and buy them in the online shop	48	51	46	58 ↑	40 ↓	44 ↓
I look for the products in the online shop, but buy them in the physical shop	17	19	20 ↑	17	15	11 ↓
I buy the products in the physical shop, but ask for them to be sent to me at home	12	17 ↑	13	12	10	8 ↓
I go to see or try on the products in the physical shop, but I buy them online	15	16	16	19 ↑	11 ↓	11 ↓
Base: Total		(1000)	(1000)	(1000)	(1001)	(1000)

Q22. When buying new products, how often have you done each of the following? (Always / Almost every time / Occasionally / Practically never / Never)

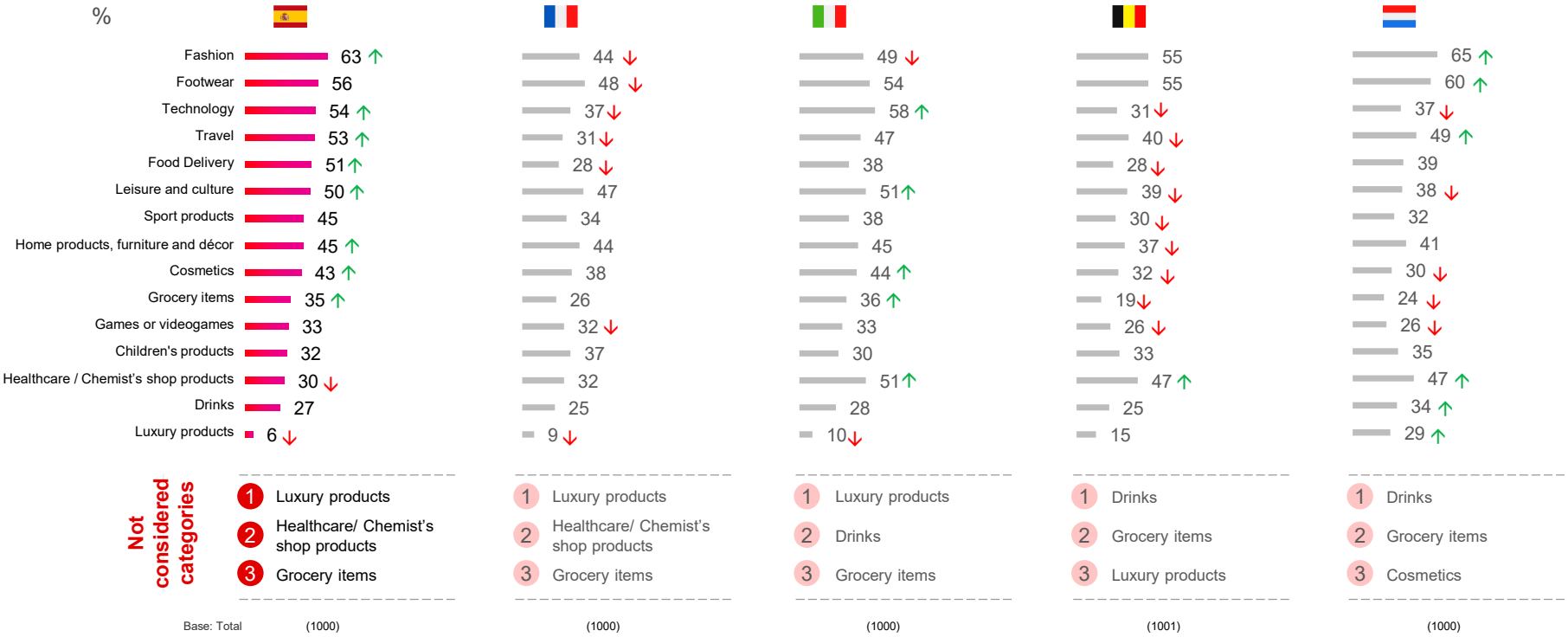
Food is the most popular category for online shopping, but other categories such as fashion, leisure and culture or cosmetics are also very popular among online shoppers in Spain.



Base: Total (1000)

Q17. What kind of products have you bought online in the past year?
Q18. How often have you purchased each of the following categories/types of products in the last 12 months? (High-Freq: Once a week or more, once every 2 weeks, once a month / Moderate: Once every 3 months, once every 6 months / Low-Freq: Once per year, less frequent)

Luxury products category is the less considered when buying online in southern Europe



Q17. What kind of products have you bought online in the past year? / Q19. And, of the following, which one(s) would you never consider buying online?

Purchase process

3 main steps

1.

Before the purchase

- Information they seek
- Touchpoints to keep them informed
- Filters they use

2.

During the purchase

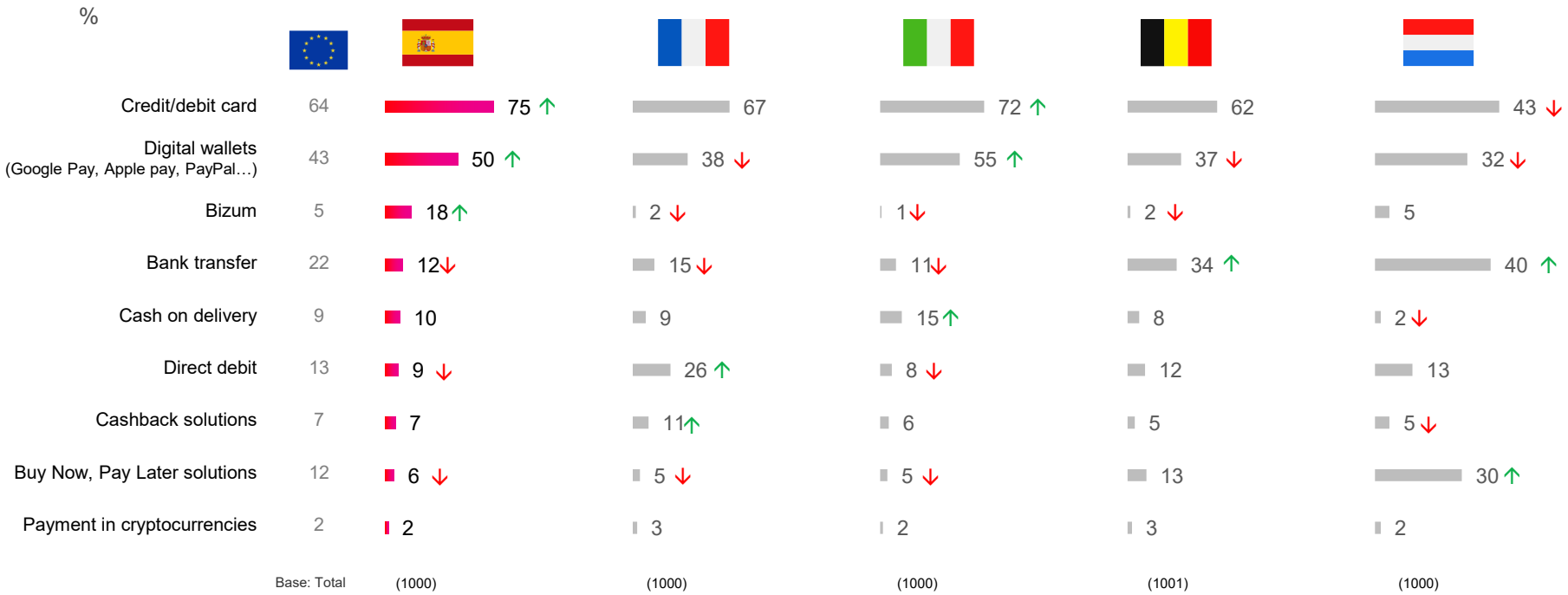
- Channel
- Filters they use
- Key elements they pay attention
- Type of product they buy

3.

After the purchase

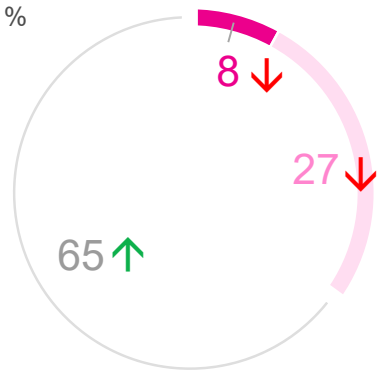
- Payment methods
- Shipping
- Returns

Traditional credit card and digital wallets are the most widely used payment methods when buying online.

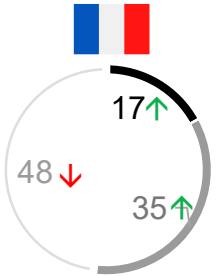


Q28. Next, we would like to ask you about payment methods that you usually use for online shopping
Of the following , which one(s) do you use most frequently for online shopping?

1 out of 3 Spanish shoppers finance online purchases, less compared to other countries



Base: Total (1000)



(1000)

(1000)

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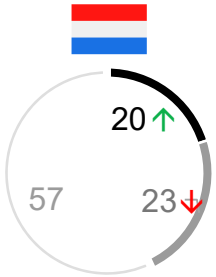


(1000)

- Yes, on all or most occasions
- Yes, rarely
- No, not at all

Q29. Do you generally defer or finance your online purchases?

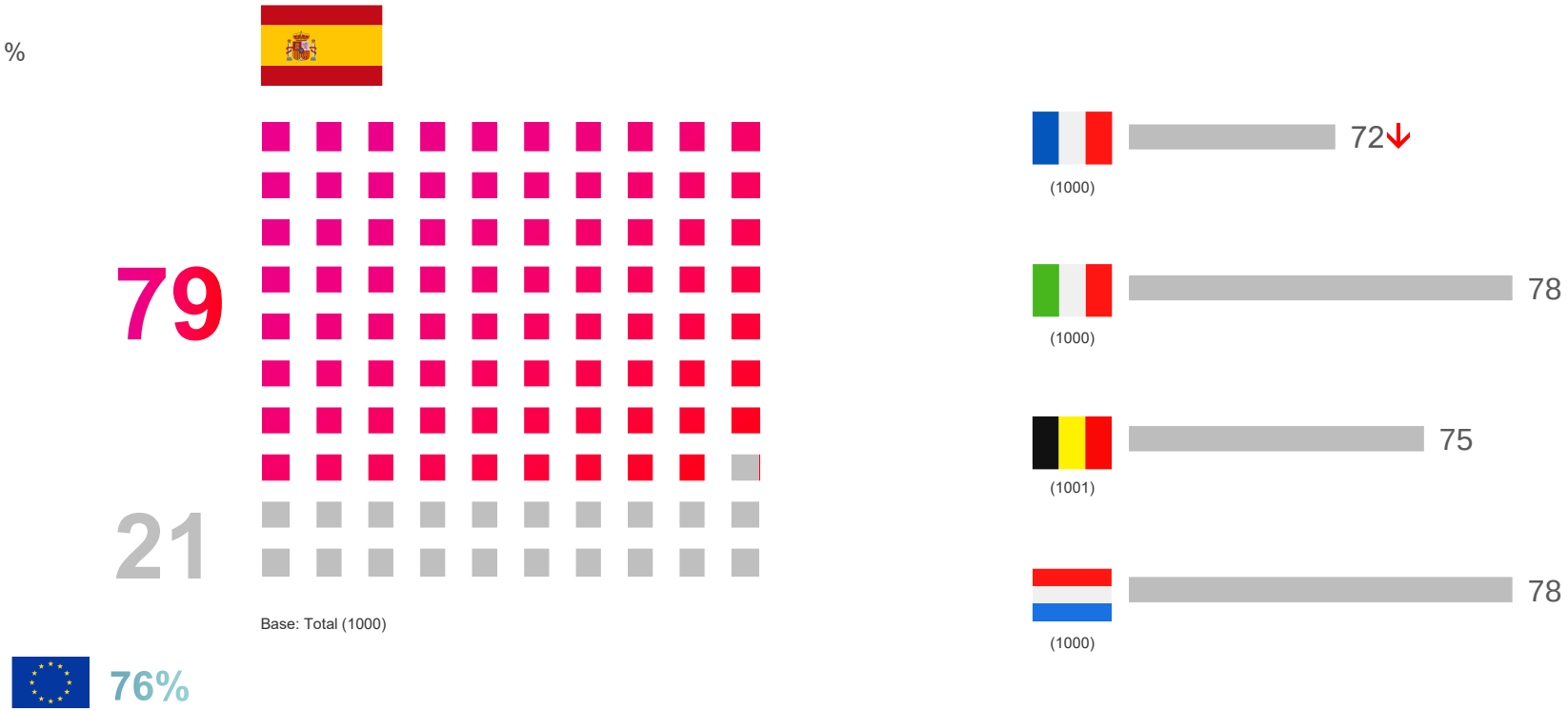
Spanish online shoppers want to control their shipping.

% Very important / Somewhat important	ES	FR	IT	BE	NL	EU
Being able to choose a free delivery option	61↑	56	60↑	47↓	47↓	54
Being able to see the delivery time and cost information before making the payment	52	50	55↑	46	44↓	49
Being able to track the status of my order in real time	41	44↑	46↑	32↓	28↓	38
Being able to choose the date and time of delivery	37↑	30	33	24↓	31	31
Being able to choose across several delivery options	33↑	31↑	30↑	18↓	16↓	23
Being able to pick up the shipment at a pick-up point	25	28↑	29↑	17↓	15↓	23
Being able to compensate for the CO2 emitted during shipping	17↑	13	15↑	9↓	8↓	12
Base: Total	(1000)	(1000)	(1000)	(1001)	(1000)	

Q30. In relation to the delivery of your orders, how important are the following aspects to you when you shop online? (Very important / Somewhat important / Not very important / Not important at all)

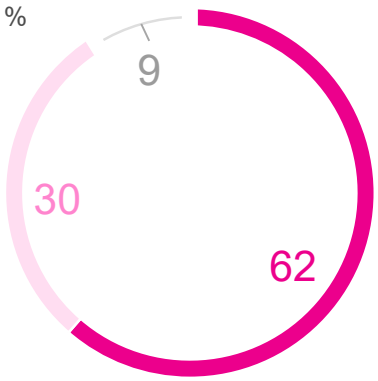
Global eCommerce Study

A challenge for manufacturers and sellers: up to 79% will return the product if it does not meet their expectations.



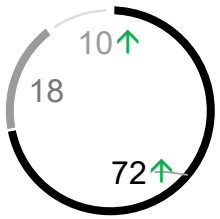
Q31. What would be your first reaction if a product you bought online did not correspond to what you expected?

9% of Spanish online shoppers frequently return products in Spain.



Base: Total (1000)

Do not usually return
Occasionally
Usually return



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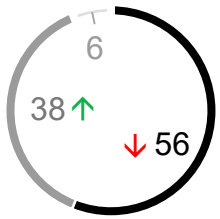

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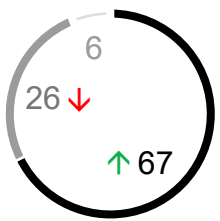

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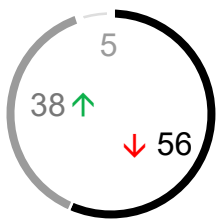


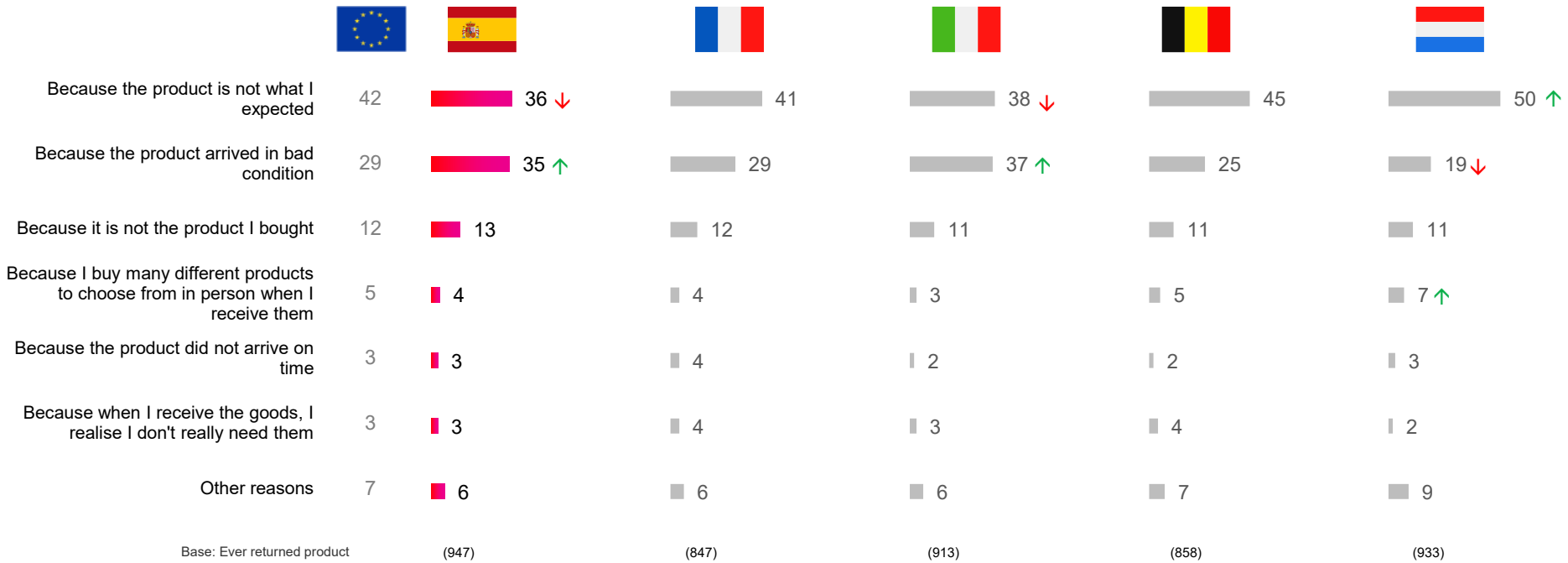
(1000)

Q32. When sopping online, how often do you return goods? (Always / Almost always / Occasionally / Practically never / Never)

Global eCommerce Study

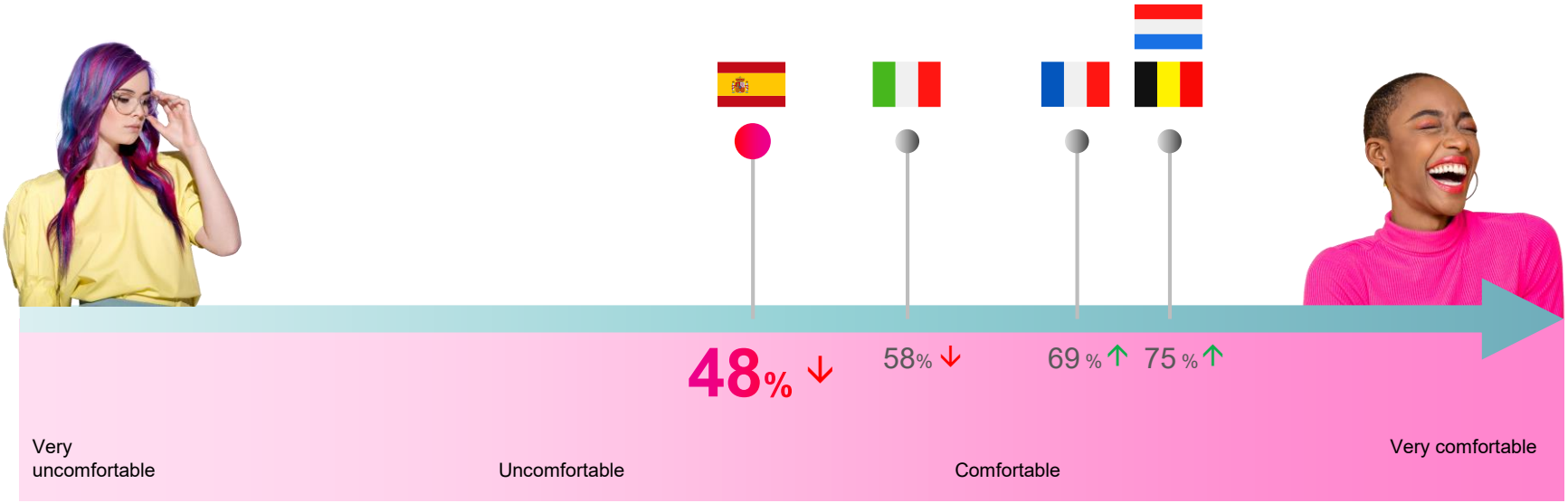
Returns are mainly due to the product not meeting expectations or arriving in poor condition.

%



Q34. Of the following causes, which is the most common reason for you to return products when you shop online?

On average, the Spanish online purchasers feel less comfortable about having to return a product.



65%

Q35. How comfortable do you feel about returning a product when shopping online?

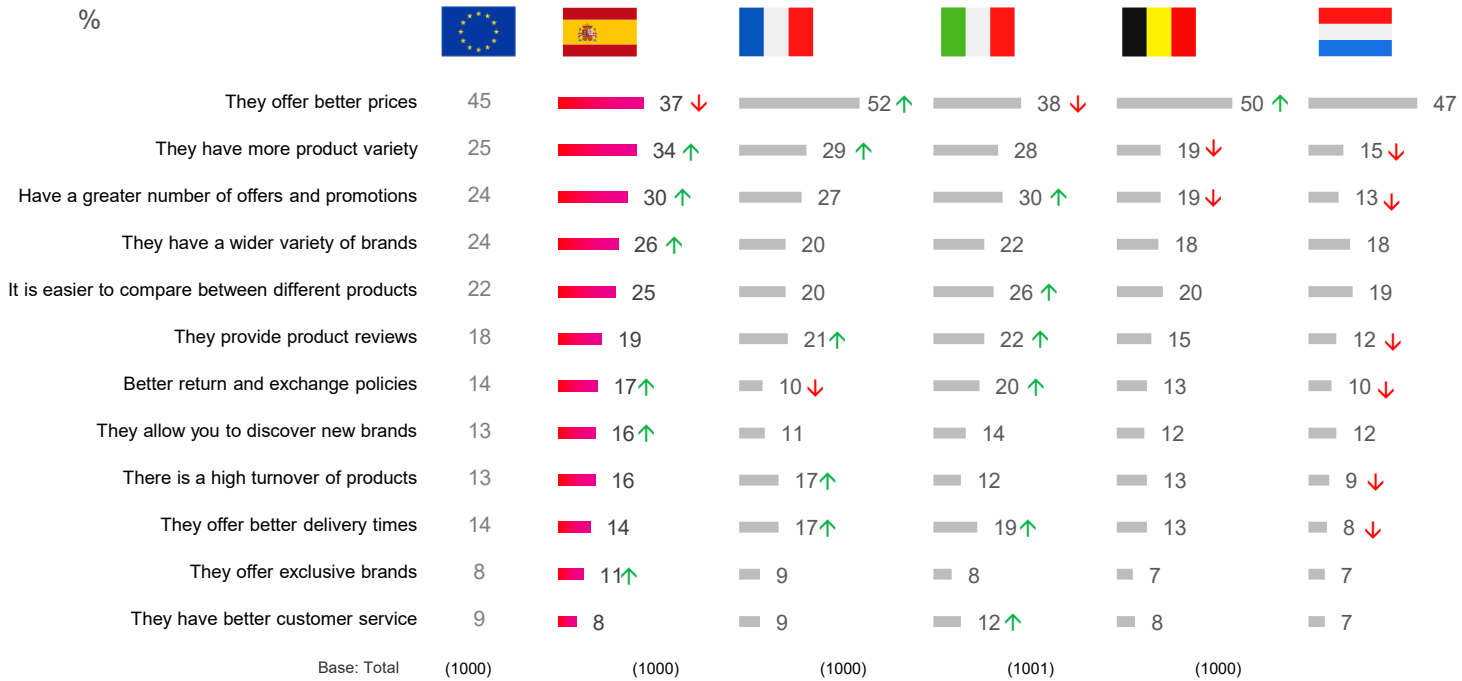
Today’s ecommerce

03 How marketplaces respond to consumer needs

Northern Europe online shoppers are more likely to purchase from the brand's online stores compared to southern Europe shoppers

Q45. If you were to make an online purchase from each of the following categories, where would you consider doing so?

Marketplaces respond well to the needs of the online consumer, with better prices and more product variety.



Q46. According to your opinion, what are the main advantages of buying products through an online marketplace?

Future of ecommerce

04 Sustainability and online shopping

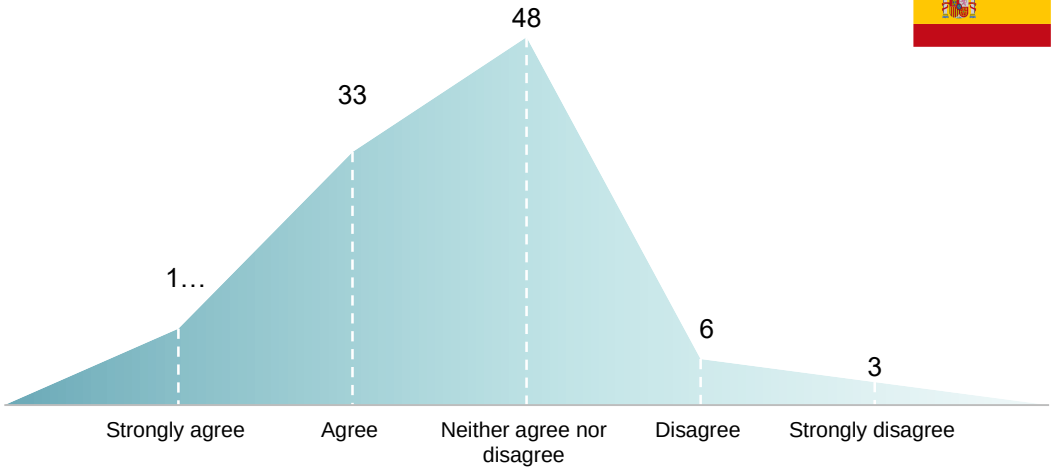
65% of the global economy is legally committed to carbon neutrality by 2050.

43% ↑

agree that online shopping has helped them make more sustainable choices / purchases

37%

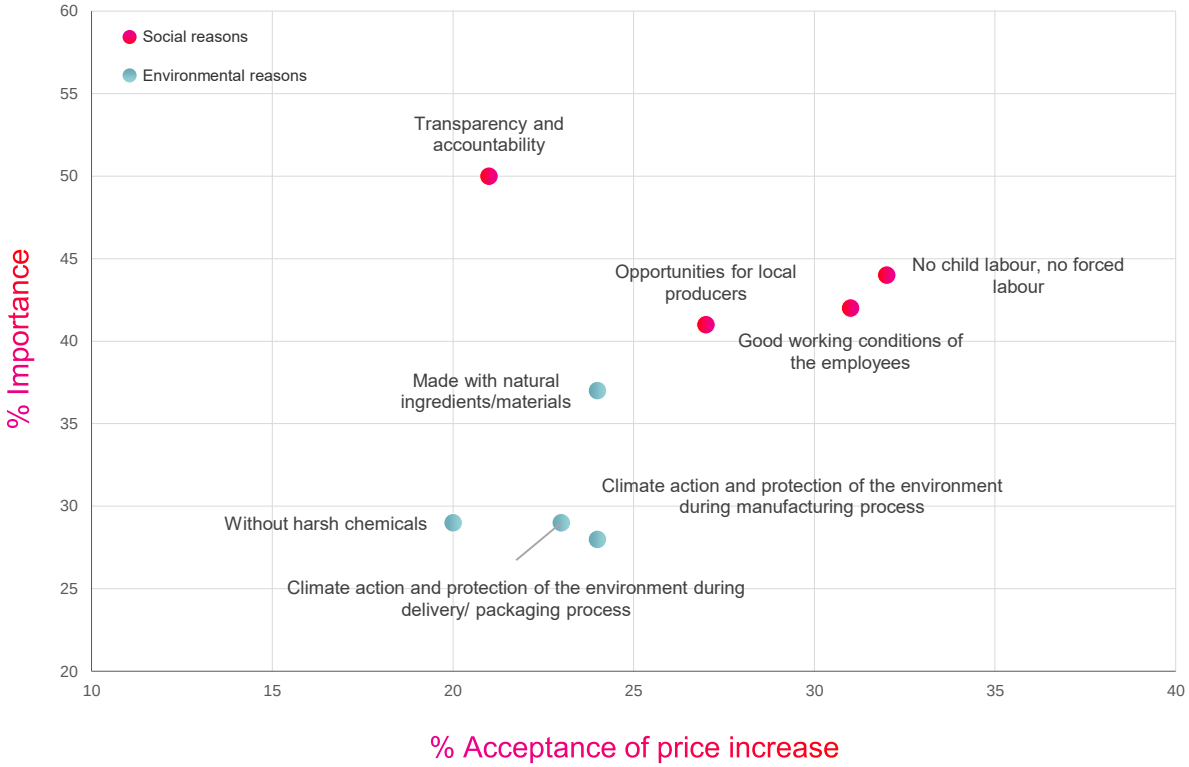
%



Base: Total (1000)

Q38. How much do you agree with the following statement: "Online shopping helped me to make more sustainable choices/purchases".

Spanish buyers are more concerned about social reasons than environmental ones.



Base: Total (1000)

Q36. How much influence do the following characteristics of the products you buy online have on your decision to buy?
Q37. For which of the following reasons would you be willing to pay a certain price increase for your online purchases?

Compared to other European markets, Spain is among the countries with a more social orientation; companies should predominantly focus on social issues

Kantar Knows

KANTAR

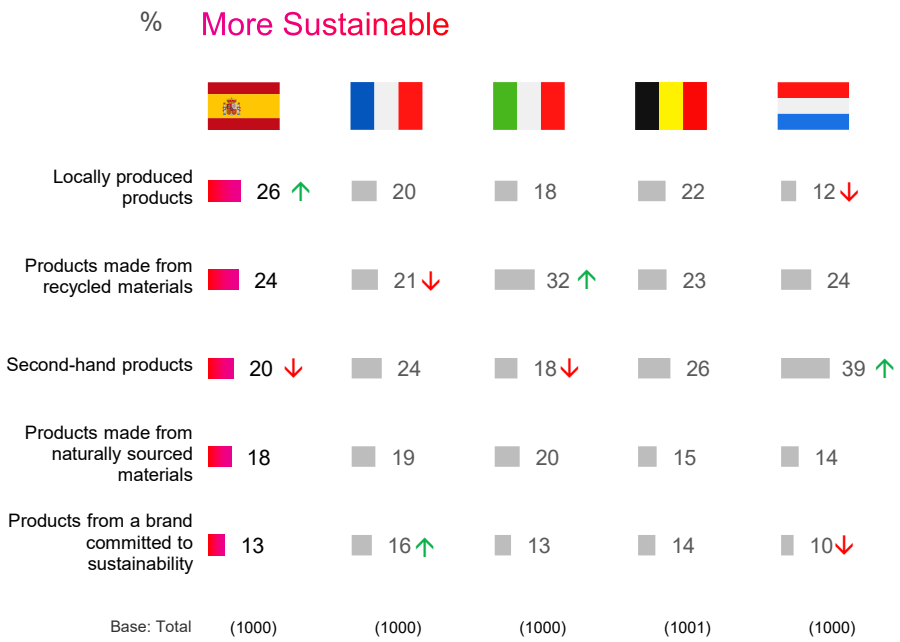
More environmental orientation ← → More social orientation

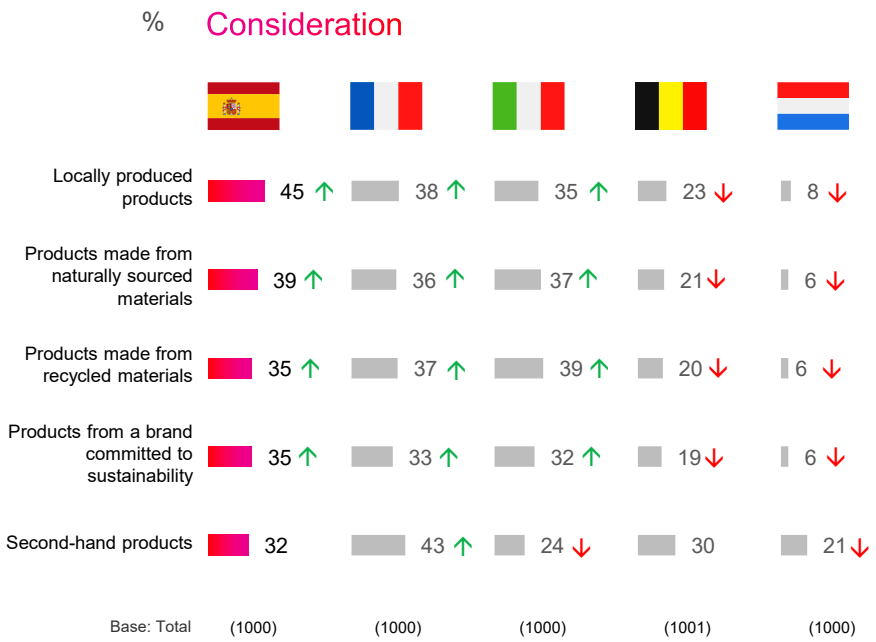
Rank	Denmark	Poland	Italy	Germany	Turkey	Norway	Finland	Belgium	Netherlands	France	Sweden	UK	Spain	Israel	Romania	Greece
1	Water pollution	Lack of clean, safe water	Rights at work and living wage	Child labour and worker exploitation	Deforesta-tion	Ocean plastic pollution	Child labour and worker exploitation	Child labour and worker exploitation	Child labour and worker exploitation	Child labour and worker exploitation	Child labour and worker exploitation	Mental health issues	Child labour and worker exploitation	Violence against women	Child labour and worker exploitation	Child labour and worker exploitation
2	Greenhouse gas emissions	Water pollution	Air pollution	Ocean plastic pollution	Violence against women	Mental health issues	Water pollution	Poverty	Poverty	Rights at work and living wage	Violence against women	Child labour and worker exploitation	Rights at work and living wage	Poverty	Poverty	Poverty
3	Ocean plastic pollution	Child labour and worker exploitation	Improper disposal of hazardous waste	Intensive farming practices and animal cruelty	Increasing economic inequality	Child labour and worker exploitation	Rights at work and living wage	Water pollution	Ocean plastic and microplastics pollution	Loss of biodiversity on land	Intensive farming practices and animal cruelty	Poverty	Access to jobs with a sufficient living wage	Child labour and worker exploitation	Access to healthcare	Rights at work and living wage

Environmental concern Social concern

Source: Kantar Sustainability Sector Index 2022

In Spain, proximity products are perceived as the most sustainable, while also generating the highest purchase consideration



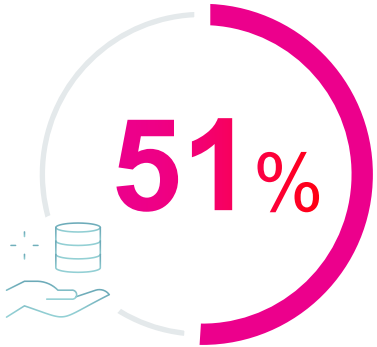


Q39. Which of the following product types do you think is the most sustainable? / Q40. And which one(s) would you consider buying online?

Half of the Spanish population has bought and sold second-hand goods in the last year

Total bought

Total sold



Base: Total (1000)

48%

49%

Q42. Have you bought or sold online second-hand goods in the last 12 months?

%						
Fashion, accessories, footwear	47	48	48	45	46	46
Books, music, cinema, collectibles	34	35	35	37	29 ↓	35
Consumer electronics	20	25 ↑	21	23	14 ↓	17
Electronics and household appliances	18	22 ↑	16	20	15	17
Furniture, decoration	23	22	26	19 ↓	24	25
Sports	14	20 ↑	14	13	13	10 ↓
Articles and accessories for children	19	18	21	16 ↓	22	19
Cars, motorbikes	8	8	9	9	8	7
Base: Total		(1000)	(1000)	(1000)	(1001)	(1000)

Fashion is the category with the highest second-hand turnover among the European population, followed by cultural items (books, music...)

Q43. From which of the following categories have you bought or sold online second-hand in the last 12 months?

Over and above sustainability, second-hand is perceived as a way to improve the economy

%						
Best price overall	37	45 ↑	35	28 ↓	41	38
Reduce my expenses	44	42	49 ↑	34 ↓	47	47
Extend the life of products	31	36 ↑	31	39 ↑	25 ↓	26 ↓
Reduce waste, give new life to things	33	32	27 ↓	45 ↑	29 ↓	31
Brands I like at a better price	28	26	31	24 ↓	31	30
More sustainable for the environment	25	21 ↓	25	28 ↑	21 ↓	28
It gives me access to products or brands that I could not otherwise afford	19	19	23 ↑	19	19	15 ↓
Support the local economy	12	18 ↑	12	11	14	8 ↓
Reduce the production of goods	18	16	18	25 ↑	17	16
Shop more consciously	17	15	17	17	19	19
Get more unique products, which I can't find elsewhere	16	13	14	15	17	19 ↑
Makes me feel good	11	11	9 ↓	9 ↓	12	17 ↑
Second-hand products are trendy	8	7	10 ↑	6	9	8
Base: Total		(1000)	(1000)	(1000)	(1001)	(1000)

Q41. Based on your opinion, which are the 3 main benefits of buying second-hand products online?

Kantar Knows

KANTAR

The overall Value Action Gap

97% of people want to live a sustainable lifestyle

But only…

12% of people are actively changing their behaviour

Source: Kantar Sustainability Sector Index 2022.

Future of ecommerce

05 Innovation and ecommerce trends

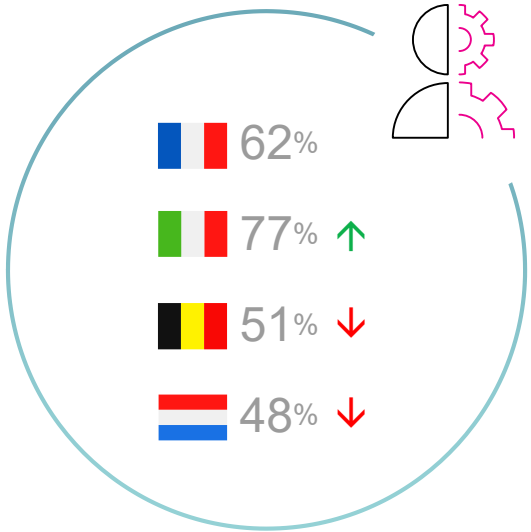
Our vision

40% of online shoppers have not yet experimented with the following innovations.

There is still great opportunity to surprise a shopper who is interested in what these technologies have to offer.

67% ↑ are interested in what new technologies can offer during the online shopping process

	%
Augmented Reality (AR)	22 ↑
Metaverse shop	21 ↑
Delivery robots and drones	20
360º product photography	20
Artificial intelligence (AI) shopping recommendations	20 ↑
Visual Commerce (being able to buy a product that you photograph)	19
M-Commerce (online retail shop specially designed for mobile devices)	18 ↑
Shoppable TV (being able to buy products you see on your TV)	14
Social media purchasing	14
Voice Shopping (being able to shop through voice assistants such as Alexa)	13
Chatbot assistance	13



61%

Base: Total (1000)

Q48. Which of the following would you like to know more about?
Q51. How interested are you in what these new technologies can offer you during the online shopping process? (Very interested / Quite interested / Not very interested / Not interested at all)

New technologies have not yet entered mass ecommerce

%	Would like to see available	Awareness	Trial
360º product photography	27	33	19
Augmented Reality (AR)	19 ↑	18 ↑	7
Visual Commerce (being able to buy a product that you photograph)	17	16	9
Artificial intelligence (AI) shopping recommendations	16 ↑	18 ↑	8
M-Commerce (online retail shop specially designed for mobile devices)	13 ↑	18 ↑	11 ↑
Delivery robots and drones	13	19	4
Metaverse shop	12 ↑	10	5
Chatbot assistance	12	22 ↓	12
Social media purchasing	12	41	17
Shoppable TV (being able to buy products you see on your TV)	11 ↑	13 ↓	6
Voice Shopping (being able to shop through voice assistants such as Alexa)	10	16	7

Base: (1000)

Q47. Which of the following tools and options for online shopping do you know, even if you have never experienced them? / Q49. Which of the following have you personally tried during your online shopping? / Q50. Which of the following would you like to see available on the websites where you usually shop?

Detailed Insights – Innovation funnel

%

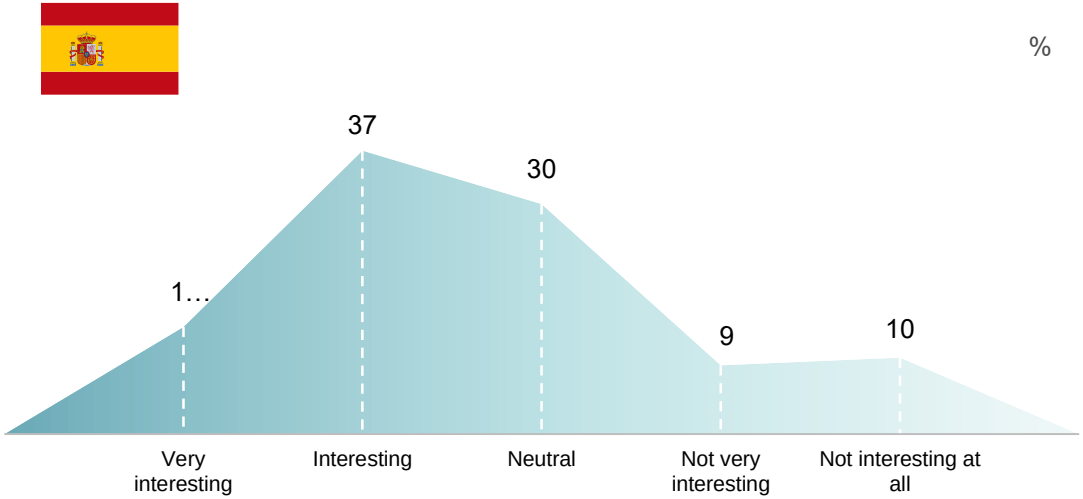
	Awareness	Trial	Would like to see available	Awareness	Trial	Would like to see available	Awareness	Trial	Would like to see available	Awareness	Trial	Would like to see available	Awareness	Trial	Would like to see available
Augmented Reality (AR)	18 ↑	7	19 ↑	15	5	13	15	5	15	13	5	10 ↓	12	4	8 ↓
Voice Shopping (being able to shop through voice assistants such as Alexa)	16	7	10	17	6	8	19 ↑	7	9	11 ↓	5	8	10 ↓	4	9
Shoppable TV (being able to buy products you see on your TV)	13 ↓	6	11 ↑	38 ↑	13 ↑	8	18 ↓	7	9	30 ↑	7	7	24	7	7
Visual Commerce (being able to buy a product that you photograph)	16	9	17	14	8	16	17 ↑	8	17 ↑	11 ↓	6	11 ↓	10 ↓	5	10 ↓
M-Commerce (online retail shop specially designed for mobile devices)	18 ↑	11 ↑	13 ↑	16	10	11	16	9	12	12	7	7 ↓	9 ↓	6 ↓	7 ↓
Delivery robots and drones	19	4	13	20 ↑	4	12	17	4	14 ↑	13 ↓	3	9	14	5	9 ↓
360º product photography	33	19	27	35	20	25	40 ↑	20 ↑	28 ↑	29	13 ↓	21	26 ↓	12 ↓	18 ↓
Artificial intelligence (AI) shopping recommendations	18 ↑	8	16 ↑	14	7	12	12	5	13	10 ↓	5	9 ↓	15	6	9 ↓
Metaverse shop	10	5	12 ↑	9	4	9	10	3	12 ↑	8	4	7	10	4	5 ↓
Chatbot assistance	22 ↓	12	12	23 ↓	10 ↓	10	29	14	12	29	15	12	39 ↑	19 ↑	13
Social media purchasing	41	17	12	43	20	12	41	19	11	44	20	10	43	17	10
Base:		(1000)			(1000)			(1000)			(1001)			(1000)	

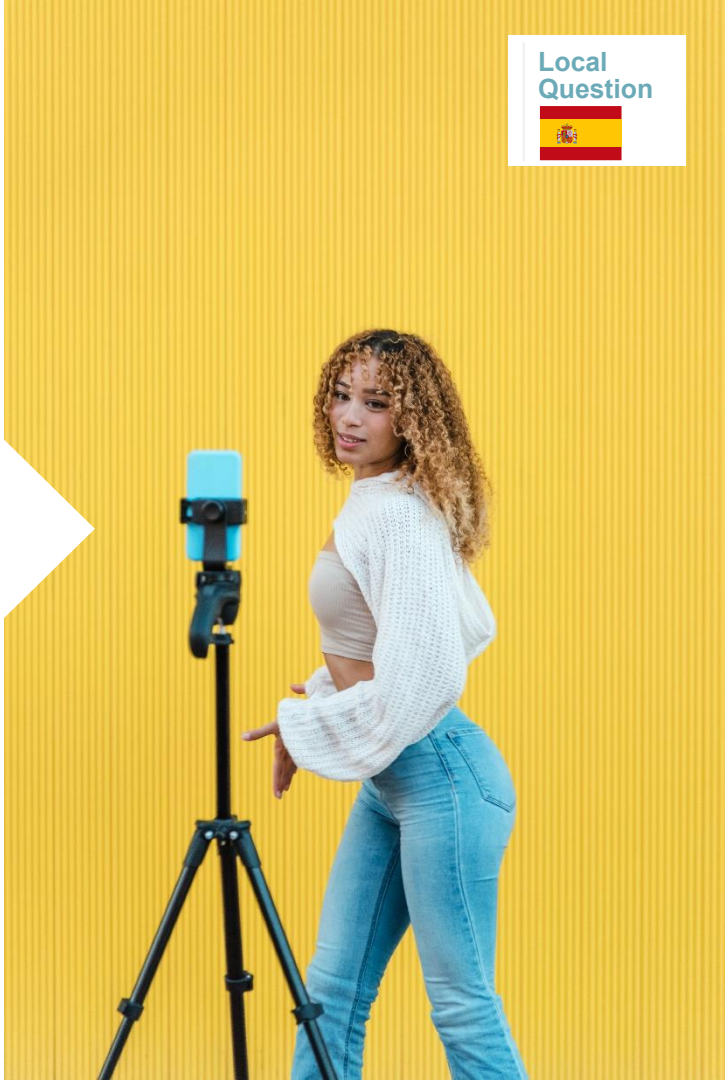
Q47. Now, we will look at some of the technological innovations that may be present in the online shopping process. Which of the following tools and options for online shopping do you know, even if you have never experienced them? / Q49. Which of the following have you personally tried during your online shopping? / Q50. Which of the following would you like to see available on the websites where you usually shop?

51%

find interesting the possibility to purchase directly through streaming platforms such as Twitch, YouTube or TikTok

Local Question





Base: Total (1000)

Q55. Live shopping is a new modality in which, through streaming platforms (such as Twitch, YouTube, TikTok...) people show live their shopping experience, so that people can know more about the product (sizes, materials, ideas...). To what extent do you find this interesting?

06

Key takeaways

Some final thoughts…

Maximizing the potential of ecommerce requires a **deep understanding** of **consumers' needs and behaviors**. From product information to purchase experience, every detail counts in **shaping online shopping success**.

1.
Convenience, price & variety

Are the main drivers of online shopping among Spanish consumers.

2.
Online shoppers are informed and demanding

Most buyers search for information before making their purchase, but still 1 out of 3 return the order because it does not meet their expectations.

3.
Provide relevant information

However, be careful not to saturate the buyer, as this can create barriers to purchase.

4.
Not every category has equal opportunities

Fashion, technology and travel are doing very well on the online channel, but categories such as luxury and healthcare have yet to catch on.

What about the future?

As we know, ecommerce is a **growing market**, but it still has many **challenges and opportunities** to be addressed.

Innovation and ecommerce trends: a growing opportunity
ecommerce should take advantage of the technological rise and bet on innovation

Sustainability and online shopping: a necessary challenge
Shoppers are increasingly committed to environmental care and seek this commitment in their online purchases.

Marketplaces
Adapting to the needs of the online shopper is essential and marketplaces respond very well to it, although they are not yet perceived as a majority first choice.

Next –
Commerce

Thank you

IESE Business School Universidad de Navarra

Veepee

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