



Online Retailing – Spain – 2022

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This report looks at the following areas:

- The impact of COVID-19 on the online retailing sector and how it is recovering from this
- The impact of rising living costs on Spanish consumers and how this is affecting the online retailing sector
- The winners and losers in the online retailing sector as we emerge into the post-COVID recovery phase
- How people shop online and which channels and retailers they use
- Attitudes towards different aspects of online retailing.

The COVID-19 pandemic boost to Spanish online sales growth is beginning to fade with the lifting of restrictions and more people returning to in-store shopping. Ecommerce sales are still growing, outpacing the Spanish retail market as a whole, but at a slower rate, up an estimated 23.9% year-on-year in 2021 compared to 34.6% a year earlier and forecast to grow 8.9% in 2022.

93% of Spanish internet users aged 16-plus made purchases online in the 12 months to March 2022, the lowest level since the onset of the COVID-19 pandemic in March 2020, but still above pre-pandemic levels, suggesting online shopping has become a long-term habit, despite the country no longer being immersed in COVID-19 restrictions. Younger consumers, generally the most internet-savvy generation, are still the most avid online shoppers with 98% of those aged 16-34 having done some shopping online in the last 12 months – but even among older consumers, those aged 55-plus, the habit is sticking, with the percentage doing some shopping online in the last 12 months significantly above pre-pandemic level. Clothing, footwear and/or accessories are the most popular purchases, but across nearly all product categories purchasing levels have fallen year-on-year, with some of the steepest declines in non-essential categories, driven in part by shoppers holding back on buying discretionary items like clothing and electronics – products often purchased online – amid the cost of living crisis.



"The lifting of COVID-19 restrictions and more people returning to in-store shopping has dented ecommerce growth, but online purchasing still remains above pre-pandemic level and the sector is still outperforming the Spanish retail market as a whole."

– **Stephen Mayles, Retail Analyst**

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Access to a wider range of brands online than when shopping in-store is the main reason why consumers choose to shop online and goes some way to explaining why one-stop marketplaces giving unfettered access to a huge range of products, like Amazon and AliExpress and department store group El Corte Inglés, are Spanish online shoppers' preferred shopping destinations.

Delivery is a deal-breaker for Spanish online shoppers. To win over customers, online sellers need to offer fast and environmentally-friendly deliveries, highlighting the advantage of store fulfilment for picking orders and last-mile partnerships with quick-commerce delivery services, such as Glovo.

Resale is an area of huge growth potential. Environmental concerns and the cost of living crisis are fuelling Spanish online shoppers' interest in buying second-hand instead of new, an opportunity for online retailers to boost their own eco credentials and at the same time help consumers feeling the financial pinch.

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