

Amazon: Creating an Ecosystem - Spain - 2023

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This report looks at the following areas:

- The impact of the cost of living crisis on Amazon's business
- An overview of the global Amazon business, including revenues and performance of key business units
- Amazon's position within each market, including market share
- A profile of Amazon shoppers, by key demographics
- Products purchased via Amazon in the past year by key category
- Amazon Prime membership, including a profile of members and services used
- Attitudes to price and convenience of shopping with Amazon as well as ethical and environmental considerations of shopping with the business.

Amazon is the biggest player in the ever growing online retailing market in Spain and the company has been expanding there rapidly in recent years. Our consumer research reveals that over 90% of respondents purchased from the online ginat in the last year.

But as in other countries the cost of living crisis is biting. Prices escalated in 2021, driven mainly by an increase in energy prices and transport costs caused by supply chain disruption, and inflation continued to soar in 2022 reflecting a record surge in energy prices stoked by the conflict in Ukraine and the pass-through to other goods and services, including the price of food and drink. Despite governmental measures to help curb inflation, such as fuel subsidies and lower electricity taxes, by year end 2022 Spain's annual HICP inflation rate reached 8.3%, the highest for more than a decade.

When consumers are forced to dedicate a larger portion of their income to food and drinks, in general, they have less to spend on categories including electricals, clothing, shoes or jewellery, hardcopy books, DVDs or video games and beauty products, the most popular products bought on Amazon in Spain.



"Amazon is the biggest player in the ever growing online retailing market in Spain and the company has been expanding there rapidly in recent years. It is projected to continue its rise over the coming years, as the online habit sticks, fuelled largely by the overwhelming demand for convenience and the wider range of brands online than when shopping in-store."

- Utku Tansel, Retail Analyst

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Our consumer research for this report confirms that there are potential opportunity areas in which Amazon can develop further. Sustainability has become a key consideration among consumers when shopping on Amazon. COVID-19 has acted to accelerate the trend. Spaniards generally praise Amazon's environmental efforts, with a substantial 70% of total respondents saying that the company is doing a lot to be more environmentally friendly.

Additionally, our survey for this report showed that almost a third (30%) of respondents in Spain would be interested in buying prescription medication from Amazon. If the company decides to introduce this feature in Spain, it needs to ensure that it does not alienate the key older cohort. Our data confirms that younger age groups would be more interested in purchasing prescription medication from Amazon but the older age groups would be likely to get more frequent use out of it.

Delivery is a deal-breaker for Spanish online shoppers. As such, almost eight in ten (79%) of all respondents said Amazon's delivery speed is the main reason they shop with it. Furthermore, almost eight in ten consumers (78%) often check the prices of products seen in-store on Amazon. 25-34 year olds are most likely to do this (88%), followed by 35-44 year olds (84%).

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