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# ENTERING THE E-COMMERCE MARKET

# IN SPAIN

FLANDERS INVESTMENT & TRADE MARKET SURVEY

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**ENTERING THE E-COMMERCE**  
**MARKET IN SPAIN**  
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### 1.3 THE SPANISH ONLINE PURCHASER

According to a recent study of IAB, companies have a better view of who actually buys online in Spain. Most of the Spanish online buyers are women, who account for 51%, while the other 49% consists of men. On average, the Spanish online purchaser is 41 years old and has a household of three people. 58% of the Spanish citizens who purchase products online, have attained a university degree. The number of online purchasers who are currently employed accounts for 75%. Most of the online buyers visit and buy the products via computer (94%), followed by smartphones (93%), and tablets (49%) (IAB, 2019).

The growth in e-commerce in Spain is largely due to the age group between 16 and 30 years old. This can also be seen on the graph below which has been taken from IAB. Due to the fact that the age group between 16 and 30 years old will continue to impact e-commerce, this will be the consumer target group of this research. Next to the impact this age group has on the e-commerce in Spain, another reason for choosing this target group is because their knowledge of digitalization and their knowledge of the economy is increasing. Therefore, youngsters are becoming more aware of the impact online purchasing can have on the economy (IAB, 2019). Accordingly, this makes them an interesting part of the population to analyse their online purchasing preferences.

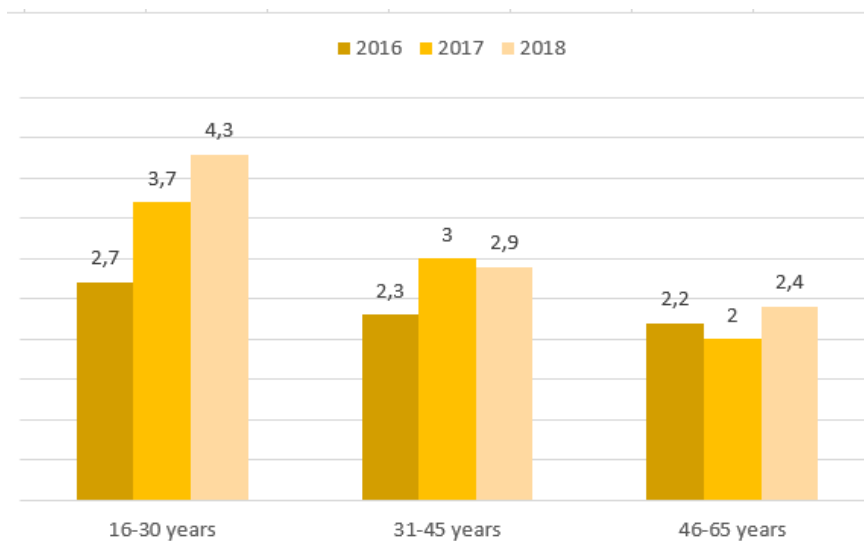


Figure 2: Number of online purchases per age group in Spain for 2016, 2017 and 2018, IAB, 2019

The Spanish e-commerce market is encouraged by drivers which stimulate the online buying process. These drivers are primarily the online product offers, price, shipping and after-sale contact (IAB, 2019).

## **1.4 SECTORS E-COMMERCE IN SPAIN**

Due to the large growth in e-commerce, it is interesting to look more in-depth in which specific sectors consumers purchase their products. In 2018, the largest e-commerce sector in Spain was entertainment and culture (68%), travel and holiday accommodation (66%) followed by electronics (61%) (IAB, 2019). Most online purchases for these sectors accounted for €100 to €499 (Ecommerce Foundation, 2019).

In general, there is still a difference between products and services when purchasing online. Physical products such as clothing, furniture, and books are more often purchased online than services such as travel tickets and restaurant bookings. Digital content, for example software and online games, is also sold online but to a lesser degree than physical products and services (IAB, 2019).

### **1.4.1 Chocolate sector**

It is complex to find facts and figures about online sales of chocolate in Spain. Therefore, the Spanish chocolate sector will be discussed in general and we will have a look at the general online food sales. This does thus not only include chocolate but different kinds of food products.

In 2016, the Spanish chocolate market grew by 11%, and represented a value of €184 million for that particular year (European Supermarket Magazine, 2016). Nestlé's Chocolate Barometer acknowledged that in 2015, 60% of Spanish families bought chocolates, especially at Christmas. Other days on which consumption is higher is on Valentine (5%), Father's Day and Mother's Day (both 3%) (Sweetpress, 2016).

In 2015, a report from Nestle Market Intelligence Department released results of chocolate consumption in Spain. Interestingly, there are regional differences when it comes to chocolate purchasing. Spain's north-eastern region which includes Catalonia, the Balearic, and Aragon, accounted for 24% of the national chocolate consumption in Spain. The Southern area, Andalusia and Extremadura, followed with 18%. The Community of Madrid represented 15% of Spain's total chocolate consumption. Spaniards living in the area of Barcelona spend on average 25% more on chocolate per year (Sweetpress, 2016).

In 2018 Nestlé España remained the leading seller of chocolate confectionery. This leading position can be associated with its brand awareness with different brands including Kit Kat, Milky Bar, Crunch, Caja Roja, etc.. Sales of other present brands as Ferrero Ibérica and Chocolates Valor further increased in 2018. The reason for this is the positively changing Spanish economy and the increasing sales of higher added value goods by consumers (Euromontitor International, 2018).

When looking at the graph of Statista below, about the products Spaniards bought in 2018, every category increased. For food, there is an increase of 5% compared to 2017. This might not seem huge but it is significant when knowing Spaniards are not that keen on buying food products online (Statista, 2019).

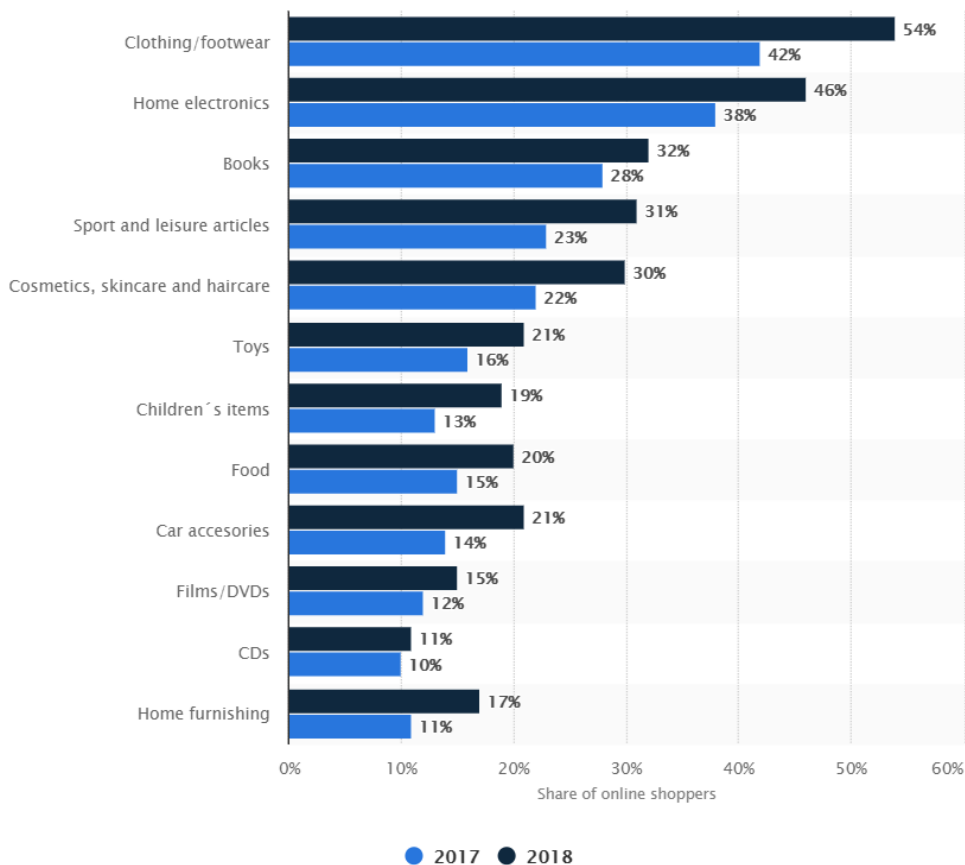


Figure 3: Most online bought products in Spain in 2017 and 2018, Statista, 2019

In 2018, the largest online food stores, according to net sales, were mercadona.es, carrefour.es, and elcorteingles.es with a net sale of respectively €235 million, €187 million and €107 million (Statista, 2019).

### 1.4.2 Fashion sector

Fashion is one of the largest sectors in the e-commerce market (IAB, 2019). In 2019, the revenue of fashion sales from e-commerce is estimated at €5.2 million in Spain (Statista, 2019).



The graph of Statista shows the estimated growth for both online food and fashion sales for upcoming years. Notice that the revenues are represented in US dollar. If converted from US dollar to euro, fashion and food and personal care represent respectively €4 million and €3.2 million in 2018. By 2023, these two sectors are expected to yield €8 million for the fashion sector and €6.5 million for food and personal care sector (Statista, 2019). The conversion from US dollars to euros was done with the help of the website VALUTA FX (Valuta FX, 2019).

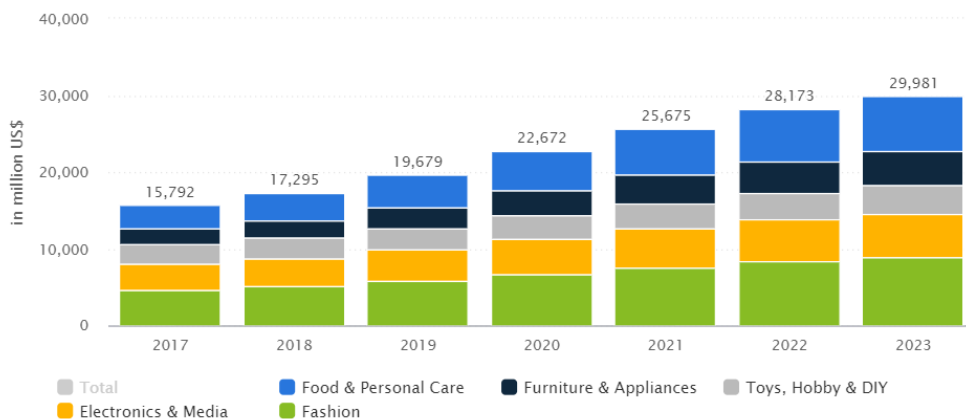


Figure 4: Predictions of sectors in the e-commerce market (in millions), Statista, 2019

In 2018, according to net sales, the most popular stores in the Spanish online fashion sector were El Corte Inglés, Zalando, Zara, Privalia and Pull&Bear. Their revenues amounted to respectively €355 million, €265 million, €160 million, €129 million and €111 million (Statista, 2019). Almost every mentioned store is of Spanish origin. Therefore, it is clear that Spaniards prefer to buy from international stores which originate from Spain.

## 1.5 PAYMENT METHODS IN SPAIN

According to the Statista graph below, Spanish citizens prefer paying via PayPal when buying products online. Over one year, the percentage of using PayPal as a payment method increased with 7%. For 43% of online sales in 2018 Spaniards used debit and credit cards. (Statista, 2019). The graph below of Statista shows the payment methods and the differences in use for 2017 and 2018.

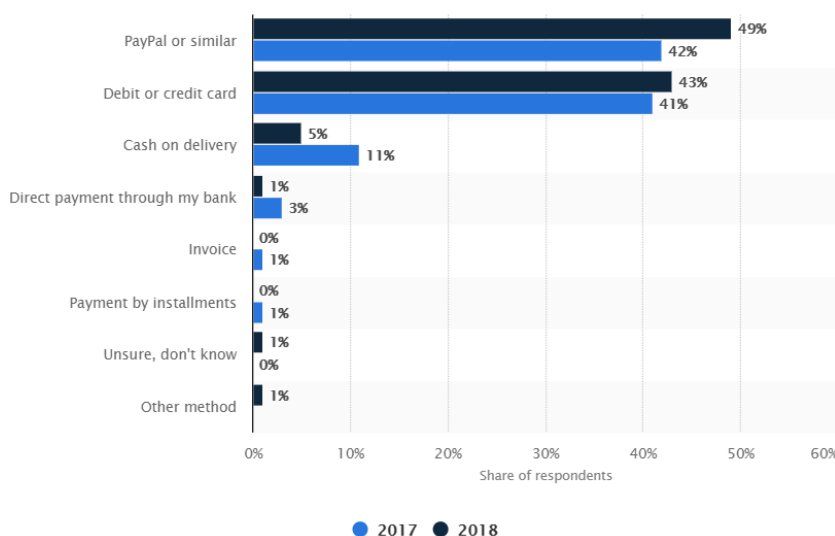


Figure 4: Preference of payment methods in Spain in 2017 and 2018, Statista, 2019













call anymore to ask questions or information, they can quickly send a message to the chatbot, which will give an accurate answer (TICTACSEO, 2018).

A (not required) login account, where customers provide some personal data to the company can become convenient on the long-term. Customers can log in to their accounts and could receive info on potential interesting products, benefits or discounts which are related to their past search sessions. This aligns with trust because not everybody is keen to give away personal data on a website.

Next to creating a login account, companies can give the option to customers to create their wish list which has advantages for both company and customer. Companies can use the wish list of clients to send reminders, place advertisements via social media and are able to follow up on the interests of the customer. This will encourage and seduce customers to buy the products in their wish list. For customers who do not have the necessary funds available, they can save their wish list and visit the site later when they do have the funds. This is time-efficient and facilitates the purchase process. These are effective approaches to increase sales and thus develop the business (TICTACSEO, 2018).

When selling online, companies should take into account that the format of their website can change on mobile phones or tablets. This is also part of the convenience of a website, the website should be easy to use on different types of devices. Websites that become unclear and uneasy to use on mobile phones or tablets will immediately erode confidence and customers will lose their trust more quickly (TICTACSEO, 2018).

### 3.4 BROAD RANGE OF PRODUCTS

The online product range is also a very important factor. 94% of the Spanish people indicated this as an important driver when shopping online. Although, this percentage has decreased by 3% in comparison to 2017 (IAB, 2019).

By offering clients products that are similar to their past search history, it could also be interesting to promote complementary products, such as design, colour, the same collection, etc. Another way to develop your online sales is to promote your best-selling products, outlets, product combinations and new arrivals which will certainly boost a business (TICTACSEO, 2018).

Next to a broad range of products, it is a necessity to have clear, accurate, visible and persuasive information to describe the product. Pictures must be precise, of good quality, and preferably have the option to zoom in and view the product from different angles. Product information is one of the most important and decisive key aspects when ultimately purchasing the product. A product with false product information provides bad reviews which establish a harmful brand image of a product or company (TICTACSEO, 2018).

### 3.5 PRICE

In Spain price and discounts still very much influence the decision of purchasing a product. Price is one of the main drivers to persuade customers to buy a product. The price of products and/or services are a determining factor for 94% of the Spaniards. Most purchasers (60%) also wait for certain moments when they could have discounts such as Black Friday or discount coupons to buy online (IAB, 2019).

The cost of shipping or any additional costs must be clearly mentioned beforehand. When customers notice additional costs later on in the purchasing process, they might no longer be interested in purchasing the product (TICTACSEO, 2018).

### 3.6 CONTACT INFORMATION

Contact information aligns with the trust in a website or company. A ‘Who are we?’ and a help section can immediately bring clarity and instore trust to the potential clients. Under the section of contact information could belong: frequently asked questions (FAQ), a (free) service phone number, email address, locations of physical stores and headquarter and the brand values and the ethical practices the company pursues. Information provided about the delivery time, possible delivery options, returns, and refunds must also be mentioned to establish transparency between company and customer (TICTACSEO, 2018).

### 3.7 ADVERTISEMENTS

In 2016, advertising on desktop and mobile devices was estimated at €1.5 billion. When using search engine optimization companies’ total costs in Spain amounted to €783 million (export.gov, 2018).

It is known that Spanish people are really into social media and social networks. This ensures an impact on the growth of e-commerce. In 2018, 83% of the Spanish population was active on at least one social network platform. The most popular social platforms are Facebook (91%), WhatsApp (83%), Youtube (64%), Twitter (56%) and Instagram (55%). Other less used platforms are Google+ (43%), LinkedIn (33%) and Spotify (29%) (IAB, 2019).

Nowadays, S-Commerce or social media commerce is frequently used to promote a brand or company to the general public. It is an efficient way to reach many people in just a few clicks. Nevertheless, a good analysis of the target audience, a communication strategy, and a clear business profile should be consistent with the social media platforms and advertisements because not all companies have the same social outline (TICTACSEO, 2018).

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## 4. LOGISTIC CHALLENGES

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### 4.1 GENERAL LOGISTIC CHALLENGES

E-Commerce is often just seen as delivering goods to a customer. But when doing e-commerce there is an entire supply chain that needs to be taken into account. Not only before and during the delivery of goods but especially after customers got access to the ordered products, there are logistic processes that are challenging when doing e-commerce business internationally. Online as well as in physical retail, it happens that goods are returned due to different reasons.

When being active in e-commerce (especially on an international level), logistics can be a tricky area. When scaling up the logistic process of businesses, having the right third-party logistics provider is very important for (international) e-commerce. In the following subdivision 'Logistics in Spain', there is an enumeration of successful Spanish third-parties in logistics. But not only the delivery of products is important, reverse logistics are also of great importance as well as offering refunds when customers are not satisfied with their purchases (Khurana, Advantages and disadvantages Ecommerce, 2018).

When goods are sold online and sent to the customer, sometimes most attention is paid to a rapid delivery causing damage to the goods, wrong delivery or no delivery at all which is, of course, unacceptable, causes frustration on the customer side as well as on the corporate side and leads to waste (Khurana, Reverse logistics as a strategic tool for Ecommerce success, 2018).

Another situation where goods get returned in both physical stores as online is when the goods are malfunctioning. It is impossible to have a 100% error-free production. The difference between physical stores and online stores is that customers would travel back to the retail store to change the malfunctioning product whereas when the customer bought the goods online it is a little hard to return the product and have proof that the product arrived with dysfunctions. Therefore, customers expect a pickup of the product and a replacement which is not always obvious (Khurana, Reverse logistics as a strategic tool for Ecommerce success, 2018).

Since customers only have two clear interactions with the e-commerce business, the website, and the order fulfilment, it is necessary that these two are working faultlessly. If one of the prior actions are lacking, customers might lose confidence in the enterprise. Therefore, reverse logistics is a part of the utmost importance of order fulfilment to keep customers satisfied. Even though one of the previous actions might occur, when a customer can return or get a replacement this will reflect in customer retention. A customer who is satisfied even though the order fulfilment was not flawless would be likely to be a satisfied customer and return for a long time (Khurana, Reverse logistics as a strategic tool for Ecommerce success, 2018).

In 2018, no less than 43% of 1100 interrogated Spaniards already returned an item that they bought online in the past. Germany, the Netherlands, and France are the leading countries when it comes to the population returning online purchased items. These 3 countries are the leaders with respectively 53%,

52% and 45% of the population (1100 interrogated residents) already having returned an item bought online in 2018 (Best, 2019).

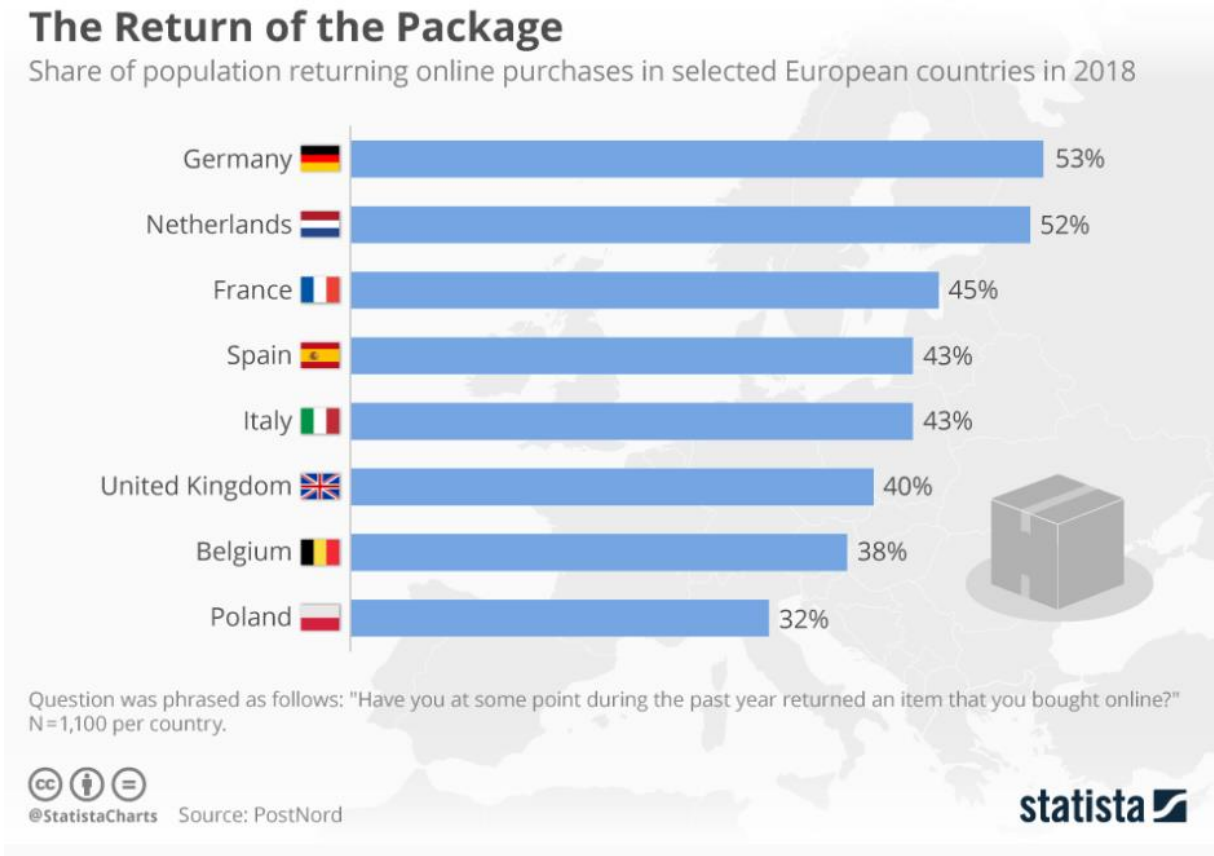


Figure 6: Share of population returning online purchases in the selected European countries in 2018, Statista, 2019

## 4.2 LOGISTICS IN SPAIN

The transportation of products from Belgium to Spain should not be a problem. Primarily because both countries are EU member states and thus follow mainly the same set of rules. The goods that originated from Belgium could be delivered to Spain by different means of transportation. Potential options could be airplanes, trucks, train or boats. Transportation in Spain should be absolutely hassle-free due to the good connection by road, waterways, ports, air, and railways.

In general, Spain's geographical location and existing connections are beneficial for transportation. Therefore, Spain is a valuable connection especially between Africa and Europe.

Beginning from Madrid, there are connections by high-speed train to 27 cities (export.gov, 2018). Spain has also many proactive ports that facilitate transportation via waterways. The major ports are Algeciras, Barcelona, and Valencia which are the top 3 busiest ports for the Mediterranean Sea and are in the top 10 of fastest growing container ports in Europe (Port Technology, 2015) (Notteboom, 2018). Transportation

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## 5. SWOT ANALYSIS OF E-COMMERCE IN SPAIN (FOR BELGIAN PRODUCTS)

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This SWOT analysis is a way of illustrating and providing an understanding of the strengths, weaknesses, opportunities, and threats of the e-commerce market in Spain. The strengths are a helpful way to achieve an objective and originate internally in Spain. Weaknesses are harmful to achieve the objective and are also originate internally. The opportunities and threats both have an external origin. The opportunities are helpful whereas the threats are harmful to the e-commerce market in Spain.

### 5.1 STRENGTHS

Worldwide, Spanish is the most used language on the Internet after English and Chinese. More than 750 million people speak Spanish, whereof for half of them Spanish is their native language. If corporations would be able to present a Spanish website their reach of customers would immediately grow (Sitsanis N. , 2018). Below, the graph of Statista which was mentioned on a webpage of Speakt, shows a visual representation of the top 10 languages used on the internet nowadays (Sitsanis N., 2018).

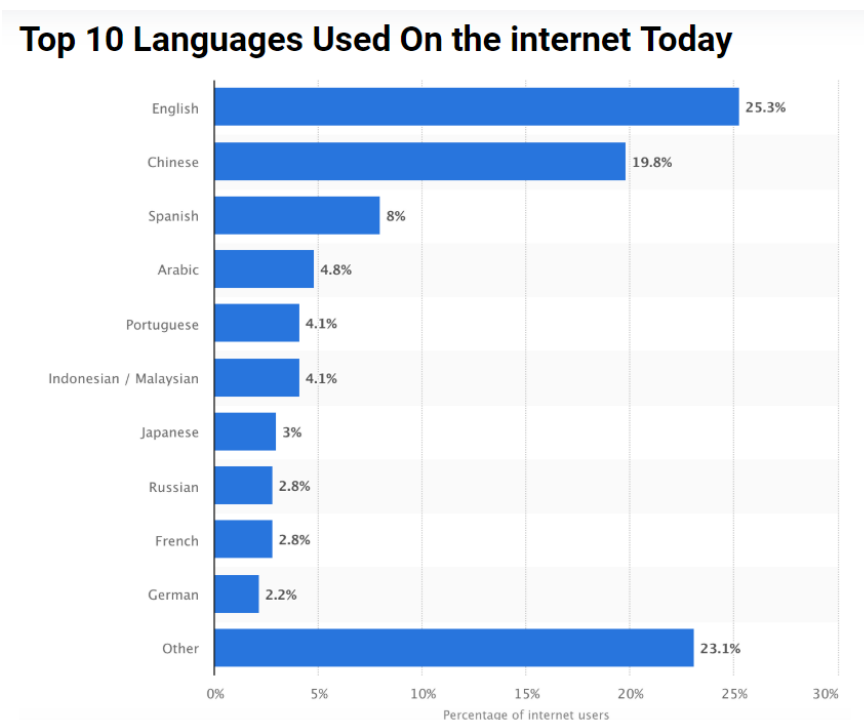


Figure 7: Top 10 languages used on the internet in 2018, Statista, 2019

Recent data from IAB has shown that 7 out of ten internet users shop online which represents 19.4 million Spanish citizens between 16 and 65 years old (IAB, 2019).

Over the past years, Spain’s economy was and is growing again after years of economic turmoil. In 2017, a Gross Domestic Product growth of 3.1% was reported, which is equal to €1.2 trillion. Therefore, Spain



turned into one of the strongest growers in the EU and is ranked at the 14th place of the largest economies worldwide (Kiprop, 2018). This is reflected in increasing customer demand. Furthermore, business investments and export to Spain is growing and the unemployment rate is falling. In 2017, Spain imported products and services valued at €310 billion (Flanders Investment and Trade, 2019).

E-commerce in Spain was worth 27.96 billion euros in 2018. That's an increase of 17 percent compared to the previous year. For this year, a growth of about 20 percent is expected, which would mean ecommerce in Spain will be worth 33.56 billion euros at the end of 2019 (Ecommerce News, 2019).

## 5.2 WEAKNESSES

Many Spaniards still do not master the English language, therefore it is an absolute must that company websites are in Spanish (Tello, 2009).

Since 2015, Spain did recover (partially) from the financial crisis from 2008. After the financial crisis, Spain was confronted with a very high (youth) unemployment which needs to decrease. In 2018, Spain had a youth unemployment ratio <sup>1</sup> of 11.3% which is really high compared to the other EU countries (Eurostat, 2018).

## 5.3 OPPORTUNITIES

The online market provides around 27.5 million potential buyers between 16 and 65 years in Spain (IAB, 2019).

Spaniards are very open, talkative and social people and this reflects in their use of social networks. This reflects the impact of networks on the e-commerce market. In 2016, social networks lead 26% of online customers, principally youngsters, to websites. Before actually purchasing a product online, 20% of the online buyers check social networks first as a source of information (Ecommerce managers, 2017).

Also, the purchased products through mobile phones (m-commerce) are growing, despite the fact that 49% of the Spaniards still feel more comfortable purchasing products online from the computer. Mostly elderly people find it difficult to purchase products from their mobile phones because of different factors (Ecommerce managers, 2017). These factors include the convenience of the computer (36%), the small screen (18%), lagging websites and the security of the payment seems unreliable (16%) (IAB, 2019).

In 2018, the use of the computer to buy online decreased by 8% in comparison to 2017. Still, the computer is the most preferred device followed by smartphones (45%), tablets (17%) and Smart TV or console (6%). The use of smartphones increased by 8% compared to 2017 (IAB, 2019).

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<sup>1</sup> Percentage of unemployed people (aged 15-24) in the total population. It is an unemployment-to-population measure.





In Europe, e-commerce is growing impressively. In the graph below from EuroCommerce, the growth from 2013 to 2017 in the business-to-consumer e-commerce market and the estimated growth for 2018 is shown. In general, (B2C) e-commerce in Europe is steadily growing which reflects in businesses more opting for selling their products or services online (EuroCommerce, 2019).

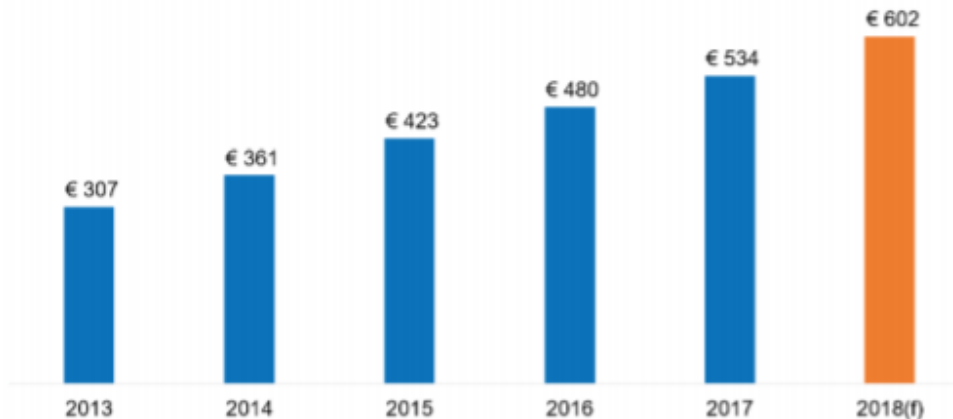


Figure 8: Evolution of e-commerce in Europe from 2013 until 2018, EuroCommerce, 2019

The European GDP of e-commerce was €17 trillion in 2018 and is estimated to keep increasing in the coming years. In the table below, Southern Europe has the second lowest GDP per capita in 2017. Northern and Western Europe are the leading regions when it comes to GDP per capita. The largest market in Europe is the United Kingdom followed by France and Germany (respectively €178 billion, €93.3 billion and €93 billion shares) (EuroCommerce, 2019).

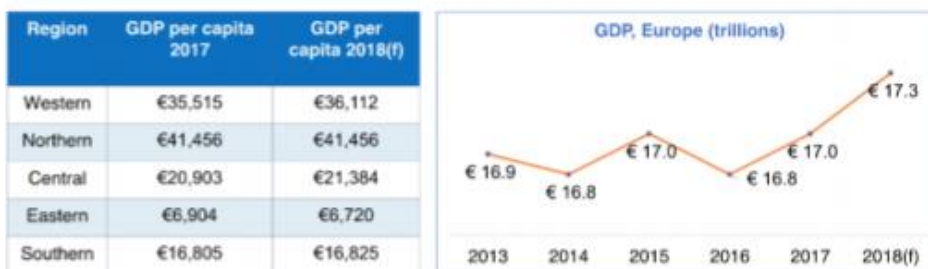


Figure 5: Comparison of the GDP in Europe from 2013 to 2018, EuroCommerce, 2019

In general, elderly consumers are still doubtful of online purchasing. The younger generation has a broader knowledge of upcoming technologies such as the Internet of Things, Artificial Intelligence, Cloud computing, etc. but they also have more extensive know-how about electronic devices such as computers, mobile phones, and tablets.

On the other hand, elderly people (50 years old and over) are more wary about technology. Most of the time, they do not possess the knowledge about electronic devices, how they work and have a lack of

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Furthermore, due to the growing awareness concerning the impact of shipping on global warming and the deterioration of the climate, customers are becoming more conscious about the consequences of fast online order shipping. Therefore, companies and customers are making changes whereas online shopping can happen in a more environmentally conscious way. If customers buy more local products, chances are big that they will use the car to go to the store. Therefore, online shopping is not as bad as it may seem due to the high number of packages carried in a truck. If everyone uses a car to go to the store, the carbon dioxide emission will be higher than the emission of a delivery service truck that holds many packages. Fast online shopping, which means that packages are delivered within at least 48 hours, are in contrast very harmful to the climate. Fast online order shipping ensures more vehicles on the way which increases carbon dioxide emissions. Although new technologies such as smart traffic lights are becoming implemented for more thoughtful delivery, customers are willing to increase their waiting time to receive their orders (Murdock, 2017).

Last but not least, the working conditions for employees in warehouses or in delivery service companies, are not always favourable. Even employees working for the biggest online retailer, Amazon, are asking for better working conditions. Therefore, employees want to form a union to get more understanding from management. Employees are overworked due to the high amount of stress that comes from order fulfilment. They also need to work overtime in busy periods even though they are not getting paid for it. In general, all delivery service companies want to serve their clients as fast as possible to attain customer satisfaction without taking into account the working conditions of the employees. The customer is placed first, whereas the employees are treated as inferior. Due to the awareness of clients and media, businesses should behave well and ensure good working conditions for their employees. If companies do not change their behaviour towards their employees, sales can quickly drop which could endanger the future of the company (Sainato, 2019).

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