



DELIVERY MATTERS

Spain

2018

Understanding online
shopper behaviour



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How the Spanish shop online...

Welcome to Delivery Matters: Spain. Part of the 10th annual Delivery Matters study, this edition looks in detail at the Spanish market, bringing you the crucial insight and trends to help shape the way you serve your customers on the Iberian Peninsula.

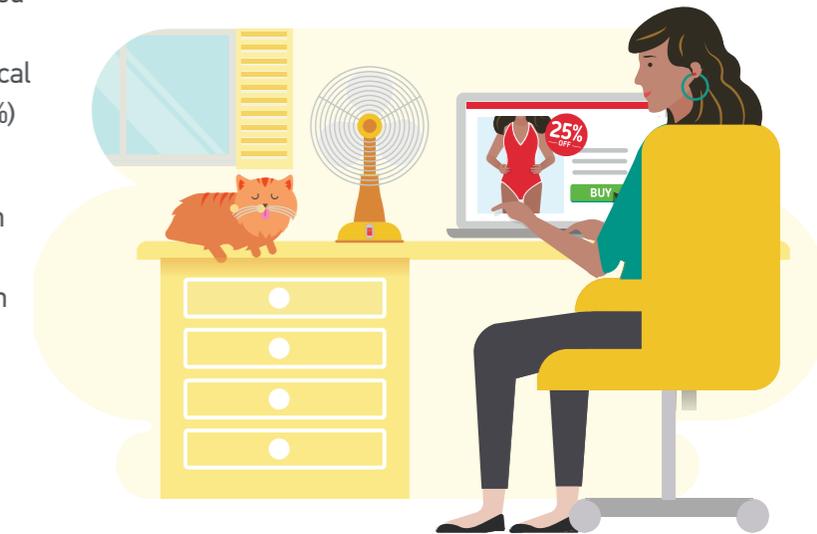
What the research shows: the average Spanish online shopper is 46 years old, is more likely to be female and to live in an urban setting. M-commerce (in other words, shopping via mobile devices) is very popular in Spain, with 51% of buyers having shopped online using a smartphone or tablet, with a higher proportion of Spanish shoppers purchasing electrical goods (29%), footwear (27%) and accessories (27%) than the international average (IA).

When it comes to delivery, expectations are high – with a large percentage of Spanish shoppers expecting free delivery on all items. And Spanish shoppers like UK websites too, with exclusivity and product price point being key factors when buying British.

Keep reading to find out more – and learn all the essential facts and stats to ensure that Spanish customers continue to buy from you again and again.

Richard Swann

**Managing Director,
Royal Mail International**

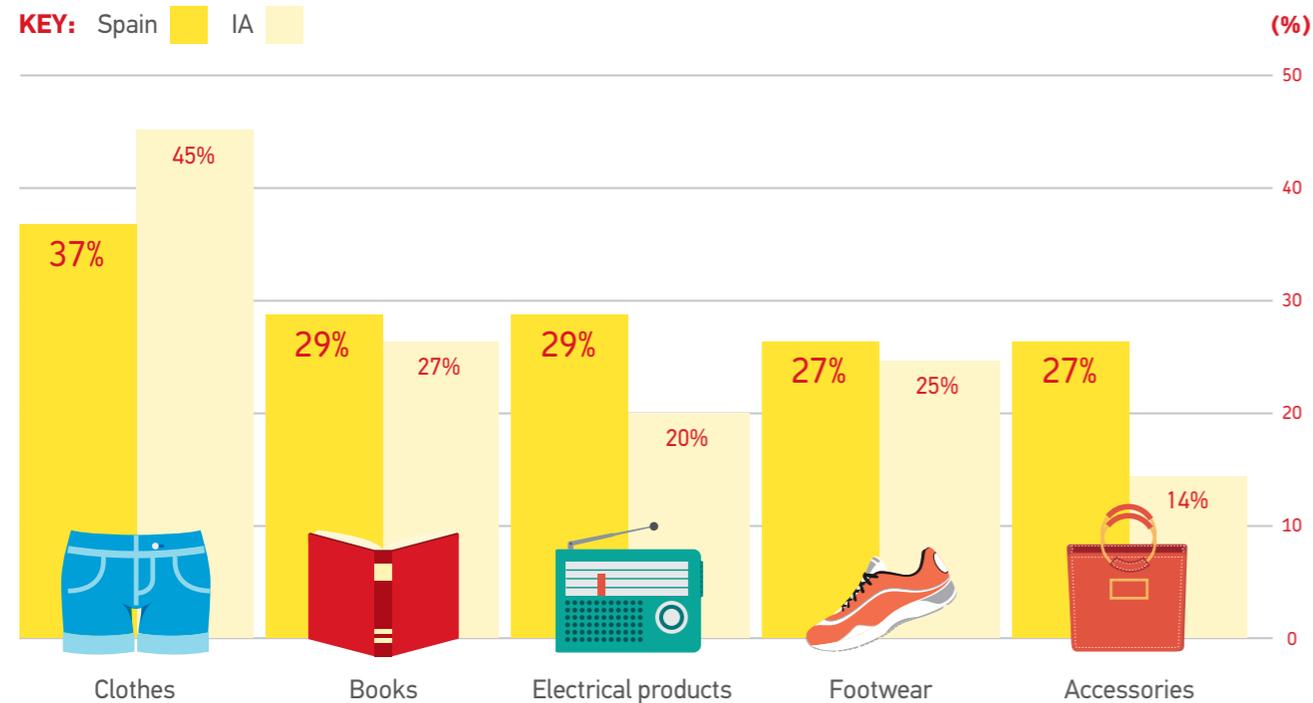


Which products reign in Spain?

When it comes to purchases, it's not all sangria and castanets. Clothes and books are the top two product categories bought by Spanish shoppers online – and electrical goods, footwear and accessories are all significantly more likely to be bought by Spanish shoppers compared to the international online buyer.

But what other categories do Spanish shoppers like to spend their hard-earned euros on? Toiletries (25% vs IA 22%), sportswear (19% vs 15% IA) and stationery (11% vs 8%) are all well above the international average.

Product categories purchased by Spanish shoppers



Shopping from UK websites

2 in 5

have shopped from a UK site during a 3 month period



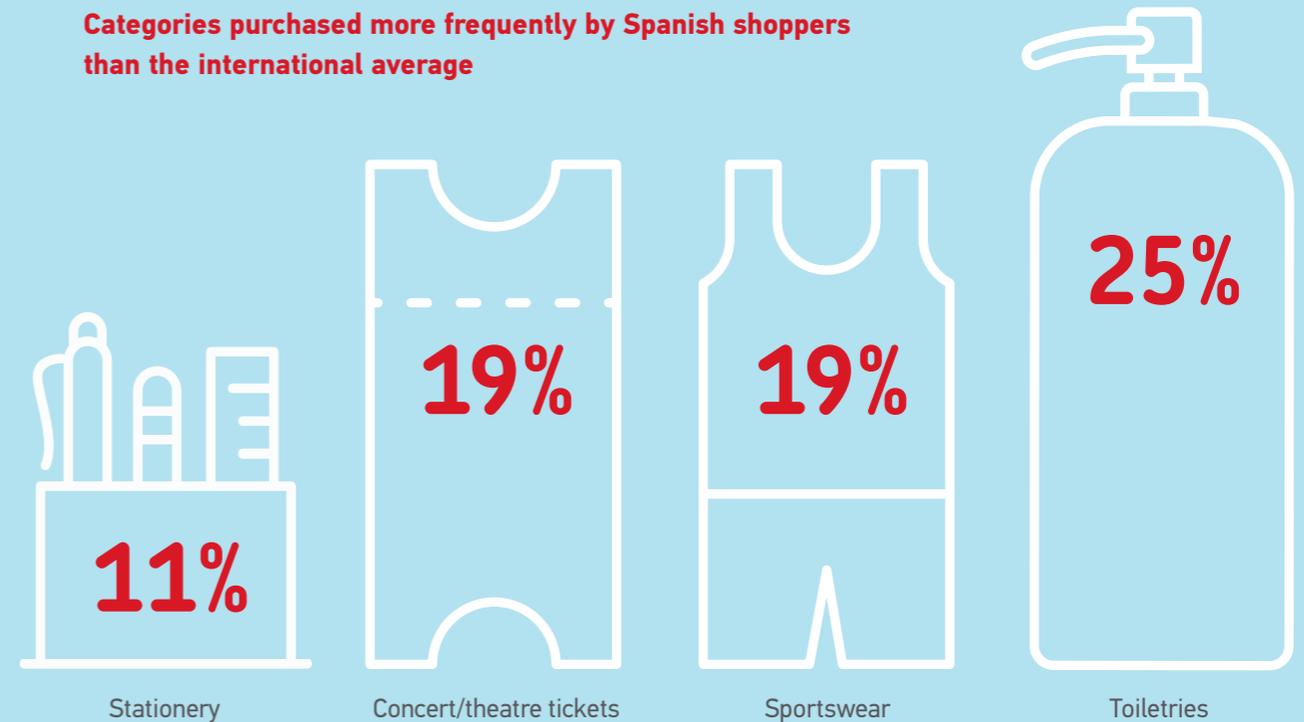
During a 3 month period the average Spanish shopper has spent

€139

when purchasing from a UK website



Categories purchased more frequently by Spanish shoppers than the international average

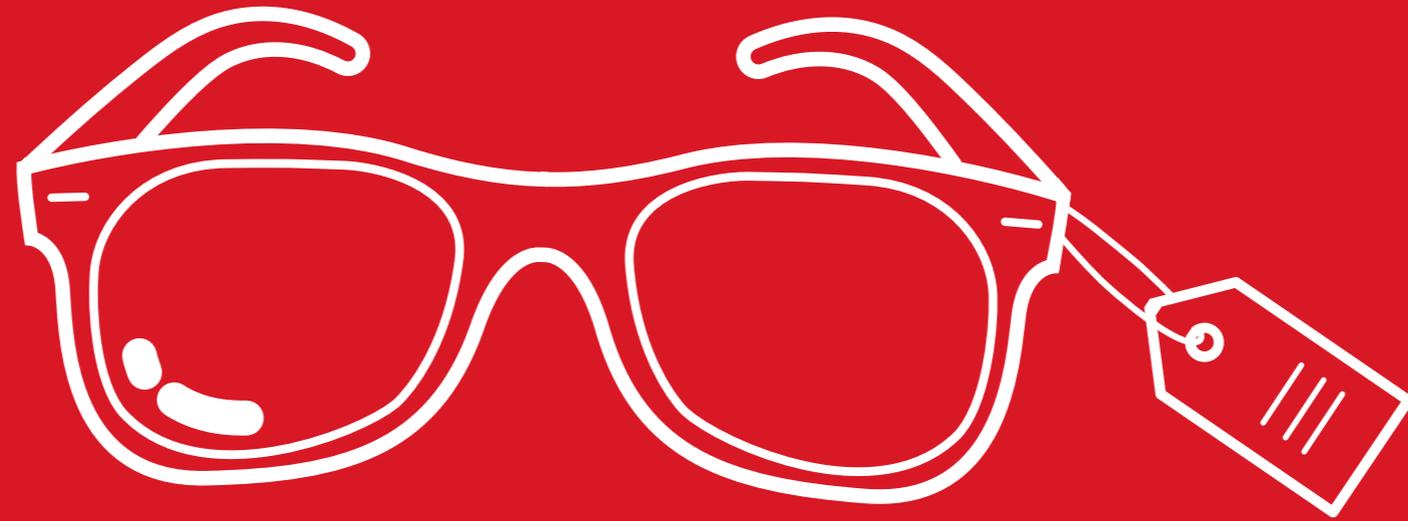


Why buy British?

Buying British is a favourite pastime for Spanish shoppers. Why? It all comes down to several key things... trust, authenticity, retailer satisfaction and delivery times. The main driver to purchase from UK sites: the exclusive availability of items (along with cost).

63%

of Spanish shoppers buying from UK sites find items to be much cheaper than locally



87%

of Spanish shoppers purchasing from UK sites trust items not to be fake

37%

of Spanish shoppers like to buy items that are only available in the UK



63%

of Spanish shoppers like to buy British brands



75%

of Spanish shoppers buy from UK sites when products are not available locally



Key Facts



Those who purchase from UK sites shop significantly more than those who don't (8 times vs 5 times), so the appetite is definitely there to buy British.

Spanish laptops are still tops

We might be living in times of great technological change, but when it comes to shopping online, the Spanish still prefer the traditional methods on offer. 84% prefer to use a laptop or desktop computer, compared to only 51% who choose to use their smartphone or tablet.

Key Tip



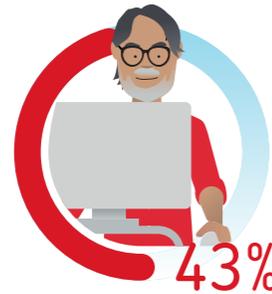
46% of Spanish shoppers consider buying online a risk, so ensure your site is secure, keeping delivery and returns information clear and showing prospective purchasers that everything you sell is 100% legitimate to build trust.

Devices used for online shopping



LAPTOP:
more likely to be used by:

- ✓ Younger shoppers
- ✓ Upmarket shoppers
- ✓ Females



DESKTOP:
more likely to be used by:

- ✓ Older shoppers
- ✓ Urban shoppers
- ✓ Males



SMARTPHONE:
more likely to be used by:

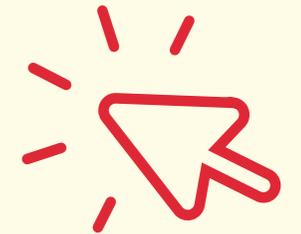
- ✓ Younger shoppers



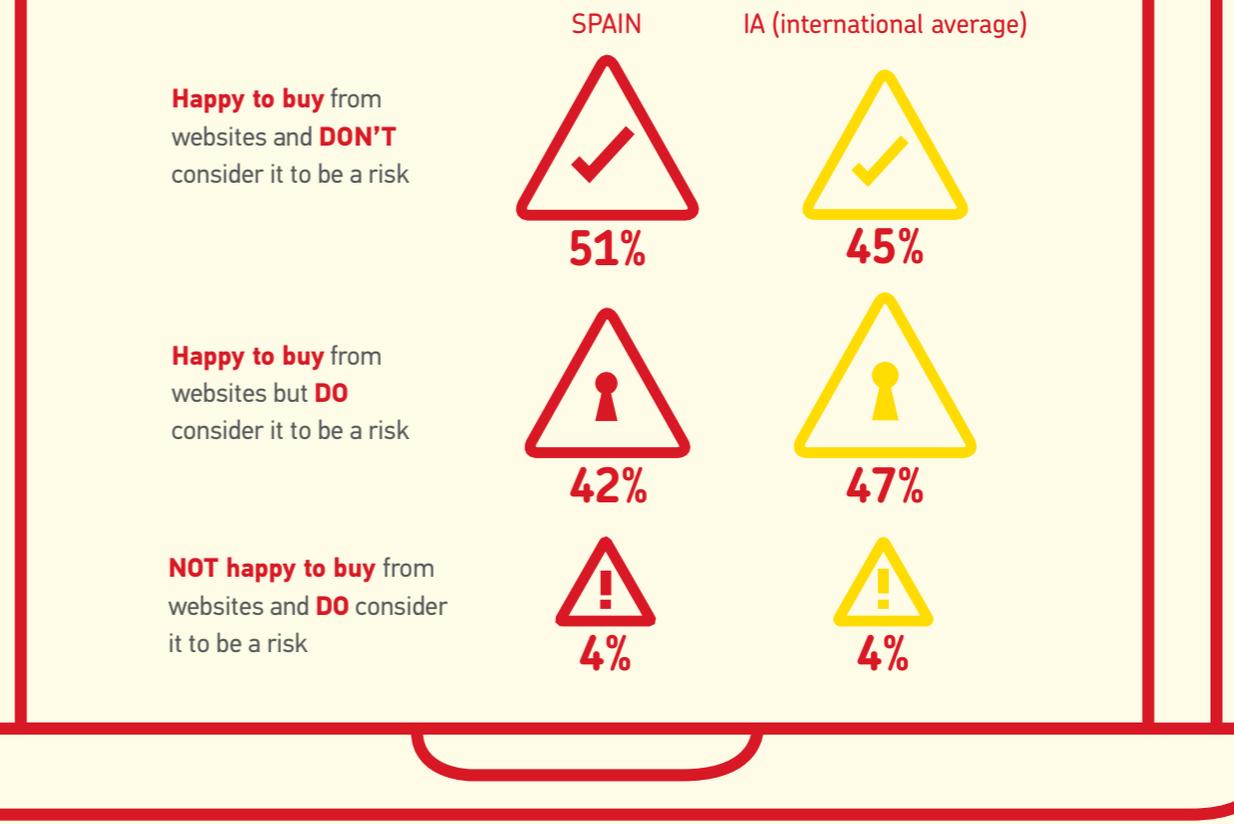
TABLET:
more likely to be used by:

- ✓ Younger shoppers
- ✓ Females

Attitudes to risk



The Spanish are happier to shop online than their international counterparts





Check out why they're not checking out...

Whether it's Manchester or Madrid, Brighton or Barcelona, cart abandonment remains the biggest problem for online retailers. But why do Spanish shoppers decide not to follow through with purchases?

Well, the good news is, amongst Spanish shoppers, frequent cart abandonment is significantly less than the international average with only 29% abandoning carts frequently (IA 35% / UK 34%). The main reason for cart abandonment in Spain? Being unhappy with the delivery charge – which is significantly higher than the international average.

Reasons Spanish shoppers regularly abandoned their cart



29%

of Spanish shoppers abandoned their cart due to long delivery times



34%

of Spanish shoppers abandoned their cart because they were just browsing



30%

of Spanish shoppers abandoned their cart because they found a better deal elsewhere



48%

of Spanish shoppers abandoned their cart due to delivery charges



Younger vs Older

In terms of age demographic, 18-34s abandon their shopping carts significantly more often than older shoppers (36% vs 20%)... and are more likely to do so when they see how much they have spent (34% vs 25%).



36%

of younger shoppers frequently abandon their cart

Vs



20%

of older shoppers frequently abandon their cart

Do you deliver satisfaction?

Sending stuff to Spain? It's important that you deliver the goods – in more ways than one. On the whole, Spanish shoppers are pretty happy when it comes to delivery, with 92% of shoppers satisfied with their most recent online purchase... that's actually significantly higher than the international average (89%), as well as Germany (89%), Australia (89%), Japan (87%), Russia (82%), Sweden (80%) and Israel (70%).

As you'd expect, delivery satisfaction is a strong driver of future purchases, with 91% of Spanish shoppers agreeing that they're more likely to shop again with an online retailer if they are satisfied with the delivery.



of Spanish shoppers use online marketplaces, with 91% of those claiming to have purchased from Amazon at some point



of Spanish shoppers consider delivery ratings influential when shopping on marketplaces



Keeping Spanish online shoppers satisfied

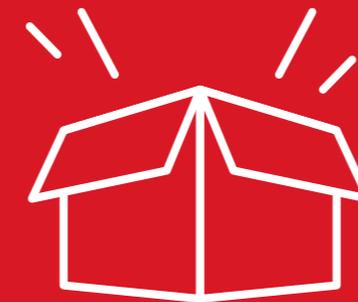
92%

of Spanish shoppers were satisfied with the delivery of their most recent online purchase



67%

of Spanish shoppers would shop more if they were offered a wider choice of delivery options



93%

of Spanish shoppers would shop more from UK sites if they were satisfied with their deliveries

Key Facts



Royal Mail uses Spain's national postal service **Correos** to deliver **International Standard, Signed and Tracked parcels.**

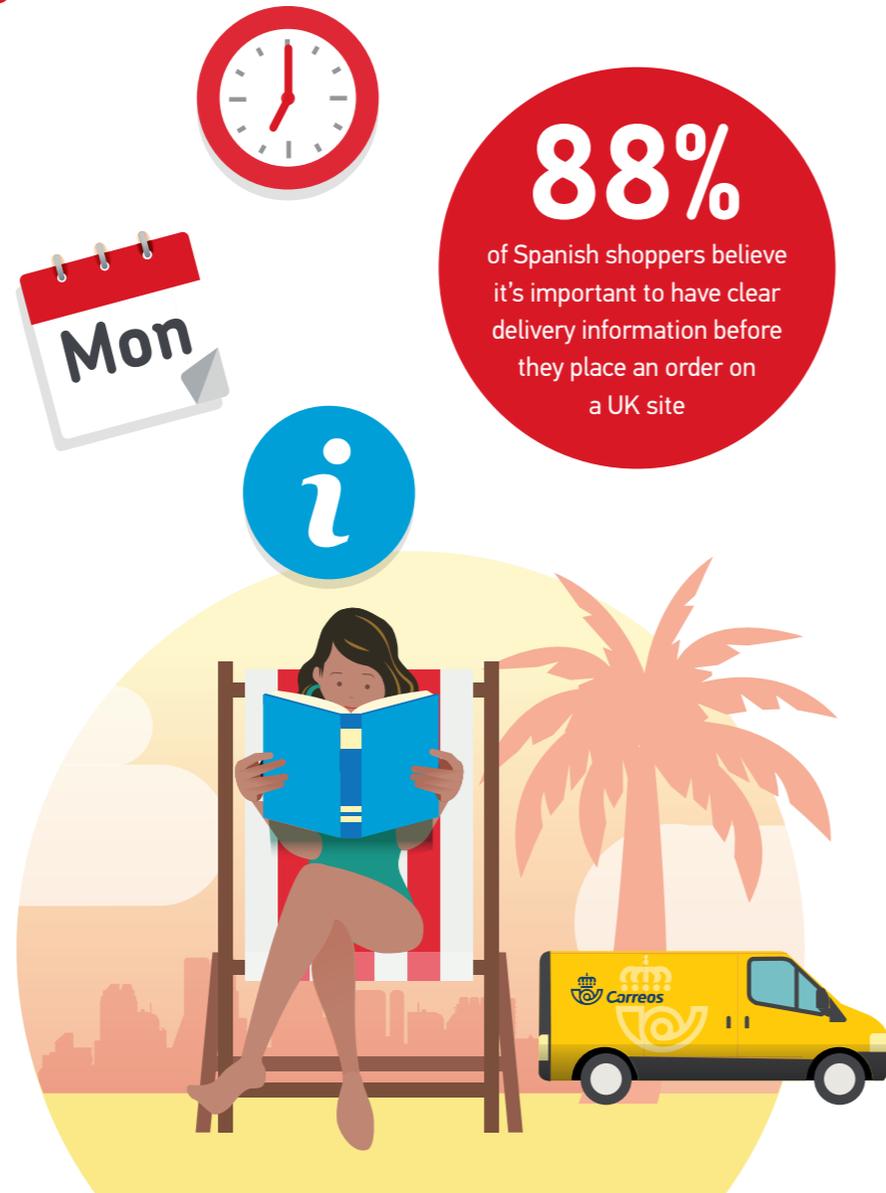


Delivery factors

When it comes to delivery options, Spanish online shoppers are more likely to want a wider choice. For example, 9 in 10 (86%) believe it's important to be able to specify a delivery day, 4 in 5 (81%) think it's important to be able to specify a delivery time slot and 1 in 2 (49%) would shop online more if their goods were able to be delivered in the evening.

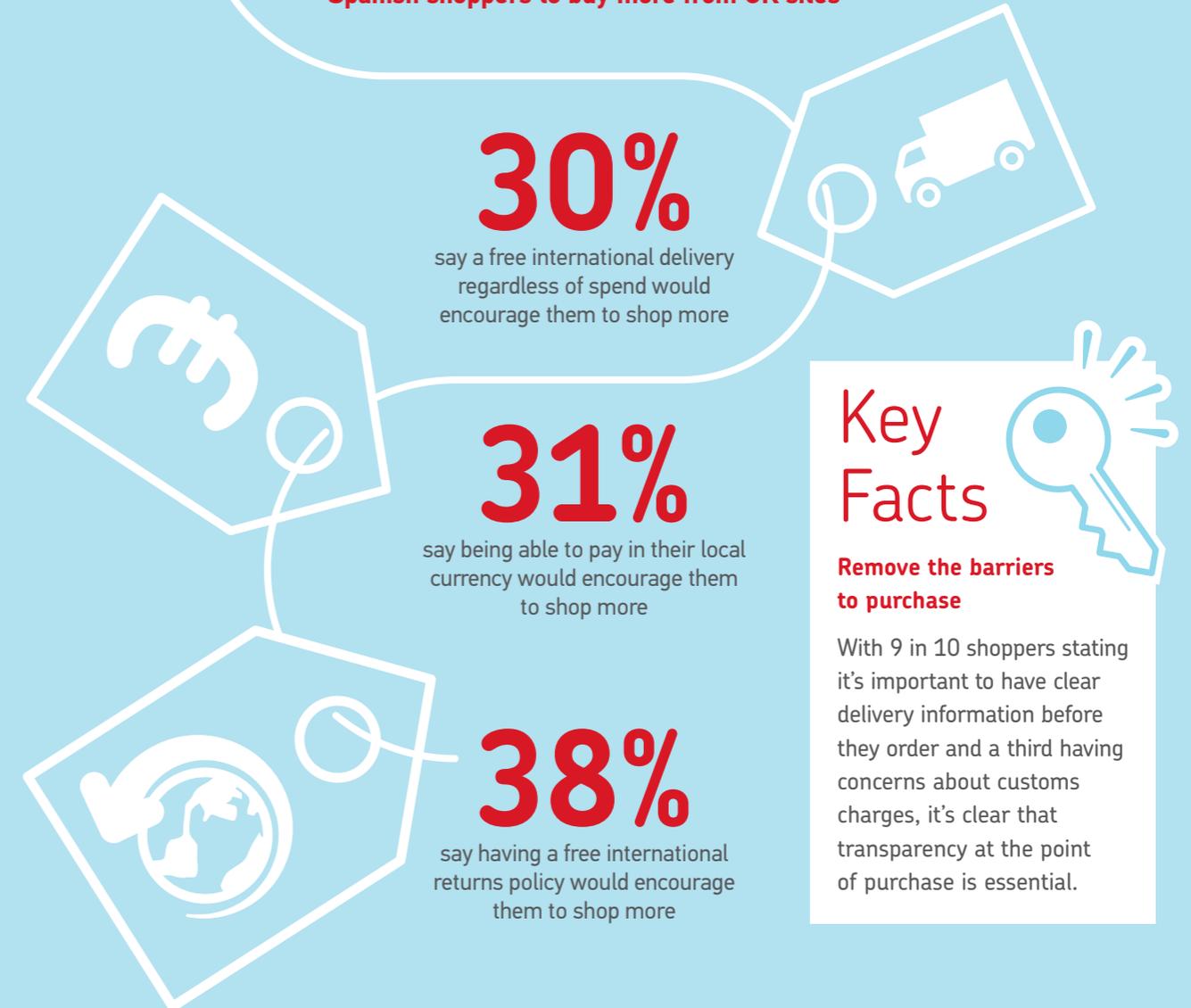
And what about shopping from UK sites? Spanish shoppers are significantly more likely to shop if there's a clear returns policy (90% versus the international average of 86%). 88% believe it is important to have clear delivery information before they place their order on a UK site and 88% search out UK sites that offer free delivery (IA 83%).

Overall, cost of delivery is the main barrier to purchase online, with only slow delivery, risk of failed delivery and lack of trust being significantly higher for Spanish shoppers than the international average.



Uno, dos, tres...

Three things that would encourage Spanish shoppers to buy more from UK sites



Key Facts

Remove the barriers to purchase

With 9 in 10 shoppers stating it's important to have clear delivery information before they order and a third having concerns about customs charges, it's clear that transparency at the point of purchase is essential.

Track it to crack it

Tracking can be a useful tool when it comes to providing customers with reassurance and confidence of knowing exactly where their package is. Younger Spanish shoppers are more likely than older shoppers to want reassurance that their item has been received at a collection depot (41%) or delivered (54%), whilst 76% want to be notified their item is out for delivery.

For the UK, 91% consider it important to receive information regarding the progress of their deliveries from Blighty – significantly higher than the international average (IA 88%), with progress from despatch to delivery considered most important (42%), followed by delivery attempt information (19%), delay notifications (18%) and delivery confirmation (12%).

Key Tip

With 83% of Spanish shoppers wanting to track every item they order if they could (vs just 59% in the UK), offer **Royal Mail International Tracked** to provide the added reassurance to buy.



91%

consider it important to receive information regarding the progress of their delivery from the UK...

...which increases to

96%

in shoppers aged 18-34



Attitudes to tracking from UK websites

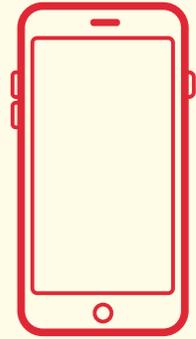
82%

of Spanish shoppers are more confident when ordering online from the UK with tracking

and

84%

of Spanish shoppers would track every item they order from the UK if the service was available



47%

of Spanish shoppers want to be notified that their item has been delivered, which increases to...

54%

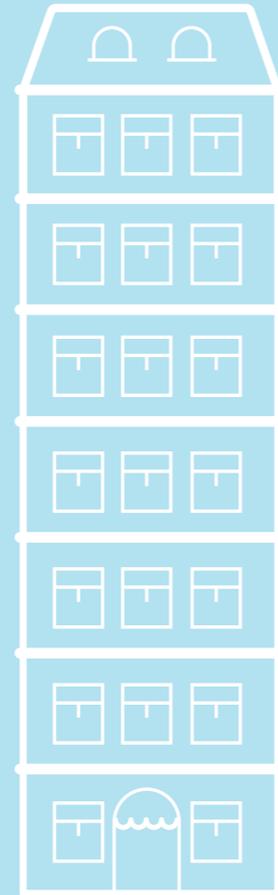
in 18-35 year olds

Addressing a key issue

As with UK online shoppers, delivery to a home address is the most common (and frequent) delivery location amongst Spanish purchasers – however, interestingly, they also regularly choose a work address or post office as their preferred delivery method should they not be at home.



Where to?



78%
of Spanish shoppers typically choose a home delivery

Home delivery



8%
of Spanish shoppers typically choose a post office or parcel shop



8%
of Spanish shoppers typically choose a work address



2%
of Spanish shoppers typically choose a parcel locker

Key Tip



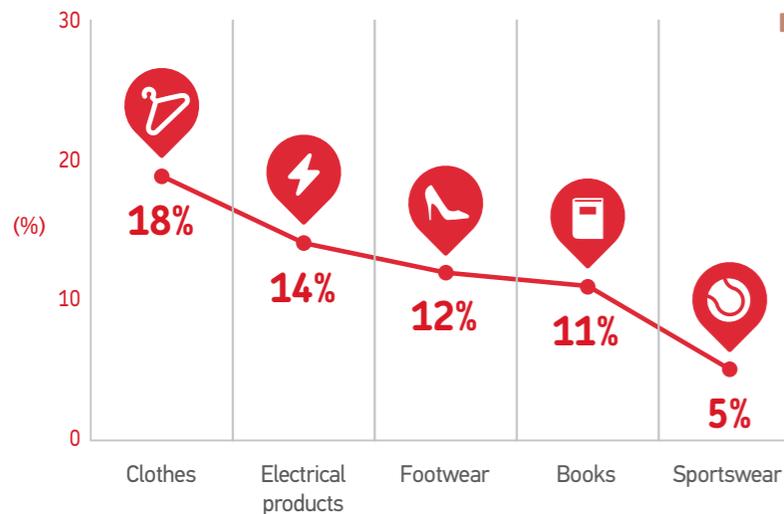
With **8% of Spanish shoppers** saying they prefer a post or work address delivery, make sure your checkout page accepts a choice of delivery address options.

Regarding returns

Everybody likes to get something for nothing – and the Spanish are no different! Perhaps that's why 92% of Spanish shoppers think it's important to be able to return items for free, with those aged 55+ significantly more likely to shop online if this is the case (94% compared to 88% of 18-34s).

1 in 10 (10%) Spanish online shoppers who have purchased from a UK site have returned an item but, compared to the international average, return rates to the UK are lower. 3 in 4 (73%) Spanish shoppers are less inclined to use a retailer again following a bad returns experience.

Popular categories returned from UK sites



Return rates to the UK are much lower than the Spanish or International average



3 in 4

Spanish shoppers would be unlikely to shop with a retailer again following a difficult return experience



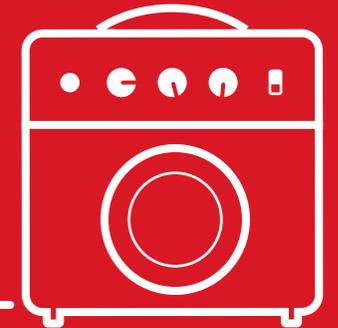
1 in 10

Spanish shoppers who have purchased from a UK site returned an item



1 in 4

Spanish shoppers have returned an item



Key Fact



90% of Spanish shoppers using UK sites are more likely to shop if there is a clear returns policy.

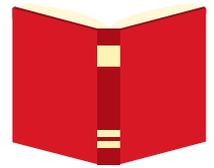
Viva España!

So, what has the research shown us? Well, when it comes to online shopping, the Spanish are out there and ready to buy – you just have to know how to press the right buttons. With delivery, expectations are on the high side... and with delivery ratings being influential on marketplaces – make sure you appeal to Spanish purchasers by offering delivery that's clear and cost-effective, or, better yet, free.

It's not all about cost, though. Delivery choice is important to online shoppers in Spain, with UK e-tailers who offer things like Sunday or evening delivery more likely to make a sale. And, crucially, ensure that your returns policy is simple and clear – adding vital reassurance when it comes to Spanish shoppers choosing to buy British.

In summary, the demand is there. Spanish online shoppers want to purchase great quality, authentic British brands. Give them what they want and you could soon be saying 'hola!' to a real upturn in sales.





Royal Mail International services

Royal Mail International Business Tracked®

Provides free shopper email notifications, inclusive compensation up to £100** and an optional signature on delivery

Royal Mail International Business Signed®

Offer extra peace of mind with a signature on delivery and inclusive compensation up to £50**

Royal Mail International Business Standard®

Give customers confidence with reliable and cost-effective delivery to over 230 countries and territories plus returns from 28 European destinations

About this research

Independently conducted by Trinity McQueen, this research was based on a sample group of 1,509 Spanish online shoppers. They completed a 14 minute survey, optimised for mobile and tablet devices, between the 25th-30th April 2018. This research is representative of Spanish online shoppers.

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