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## The leap in e-commerce



### In this number...

Retailing before and after the confinement  
E-commerce in the population  
Household spending on Internet purchases

New technologies and communications have played a key role during the covid pandemic, making it possible to work from home, to train, health care, social communication, entertainment... And they have also strongly boosted the e-commerce, as some establishments remained closed to the public or were more limited than usual in their capacity. In June 2020, retail sales through this channel were 71.2% higher than the same month the previous year. As we await the end of the year, in this bulletin we recall the main results of e-commerce in households and its weight in consumption.

In 2019, the number of online shoppers in the last 3 months was 46.9% of the population between 16 and 74 years old, slightly below the EU average, and the trend has been increasing over the years. One out of every three households made a purchase over the Internet. Overall, these purchases accounted for 2.1% of all household consumption expenditure, with a greater weight in Leisure and Culture.

**Sources:** Eurostat, INE (Retail Trade Indices, Survey on Equipment and Use of Information and Communication Technologies in Households and Household Budget Survey).

### Fall and recovery

During the first half of 2020, the activity in the retail trade experienced first a significant decrease, with monthly rates of -15.7 in March and -20.1 in April and then an also marked recovery, with increases of 19.4 in May and 17.8 in June, according to the Retail Trade Indices.

### Food stayed afloat

This evolution has been different by type of goods marketed.

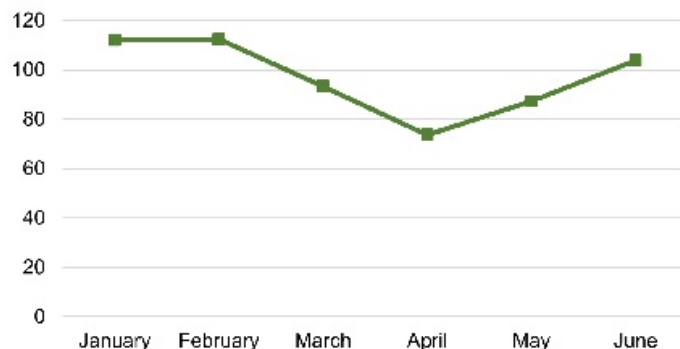
Food products had the highest volume of sales, with similar levels to last year, including a peak in March, due to the large volume of food product purchases made by households in the week prior to the start of the confinement, due to stockpiling.

For food purchases, consumers preferred large chains and department stores, which increased their sales by 7.9% and 8.5%, respectively, in the first half of the year compared to the same period in 2019.



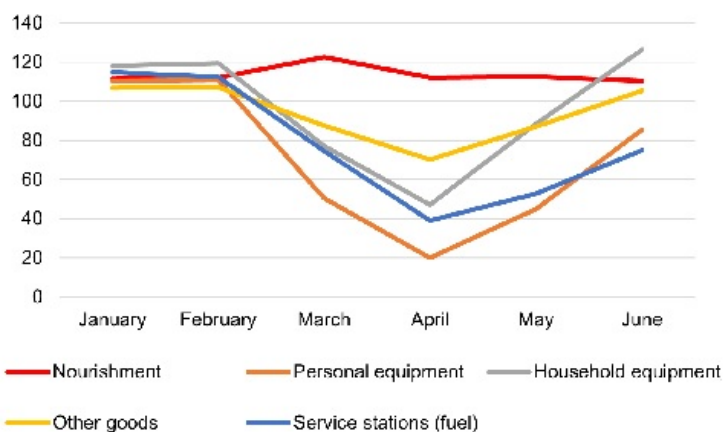
### Retail turnover during the first half of 2020

(2015=100, Series adjusted for seasonal and calendar effects)



### Retail turnover by products during the first half of 2020

(2015=100, Series adjusted for seasonal and calendar effects)



In the other product groups (except petrol), sales fell sharply compared to the first half of the previous year (-17.5%), with a minimum in April and a V-shaped recovery from May onwards. The large chains and single retail stores (the most common in essential establishments, such as pharmacies) were the ones that reduced their sales the least, with rates of -10.5% and -13.6%, respectively.

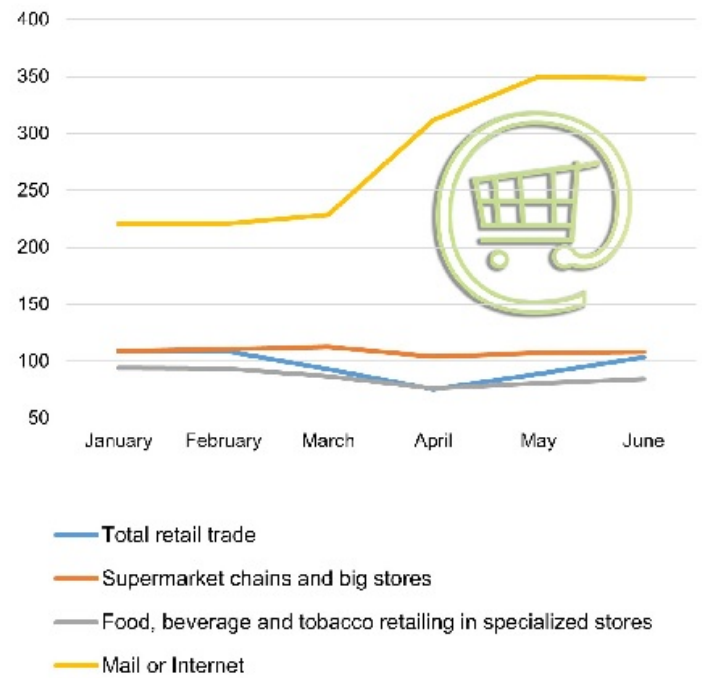
In the case of fuel sales at service stations, the recovery has been slower this half-year as a result of the reduced mobility compared to other years and the drop of tourism. However, household equipment products have had a strong increase in June, above the recorded value in February.

## The rise in online shopping

Amid this evolution of retail trade, falling in March and April and rebounding from May onwards, the internet or mail order sales channel has seen a significant rise. The upward trend in this distribution channel predated the pandemic but was much less noticeable.



**Retail turnover in Spain by channel during the first half of 2020**  
(2015=100, Series adjusted for seasonal and calendar effects)



Fuente: Eurostat (sts\_trtu\_m)

## An increase with a tendency to decrease

In June 2020, the sales figure through this channel was still 71.2% higher than in the same month the previous year, despite the slight decrease compared to May (-2.0%), as a result of the return to normality of the establishments open to the public, although with a more limited capacity than before the pandemic.



## We would rather go out to shop

The proportion of people who bought online in the last 3 months has progressively increased in the last decade, as in almost all European countries, reaching 47% of the population between 16 and 74 years old in 2019. This figure is lower than the EU-27 average (49%) and the Eurozone, which in 2019 already exceeded half of the population in this age group (52%).

The figures are higher than average in central and northern Europe, and lower in eastern and southern Europe. Denmark (74%) and Bulgaria (14%) are at the highest and lowest extremes within the EU, respectively. Among the non-member states the highest value is registered in the United Kingdom (80%).

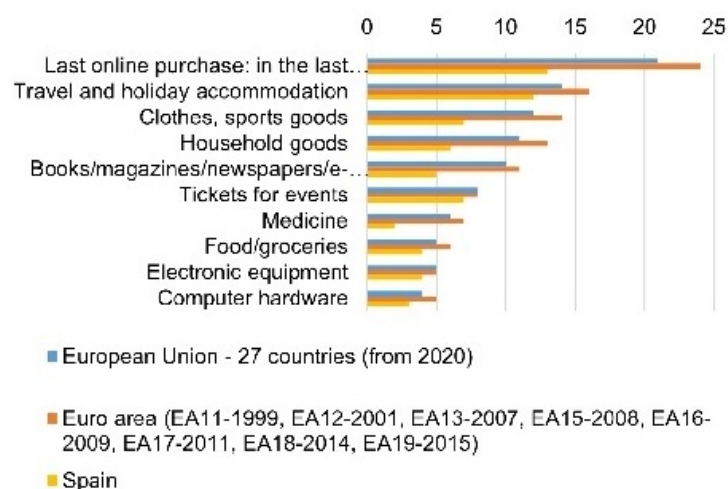
## Who buys?

According to the Survey on Equipment and Use of ICT in Households, 46.9% of the population between 16 and 74 years old bought online in the last 3 months (48.0% of men versus 45.8% of women). By age group, the highest proportion was recorded between 25- and 34-year-olds (67.2%) and the lowest between 65- and 74-year-olds (13.5%). By nationality, foreigners living in Spain bought less than Spaniards (33.9% compared to 48.6%).

The larger the municipality, the more online shoppers. And the same goes for the level of education attained and the household income, with percentages above 70% among graduates and doctorates, and among households with a net monthly income of 2,500 euros or more.

By their work status, more than half of the employed and students bought online in the last 3 months (58.0% and 58.2%, respectively). Among workers in the Information and Communication Technologies sector the figure reaches 89.6%.

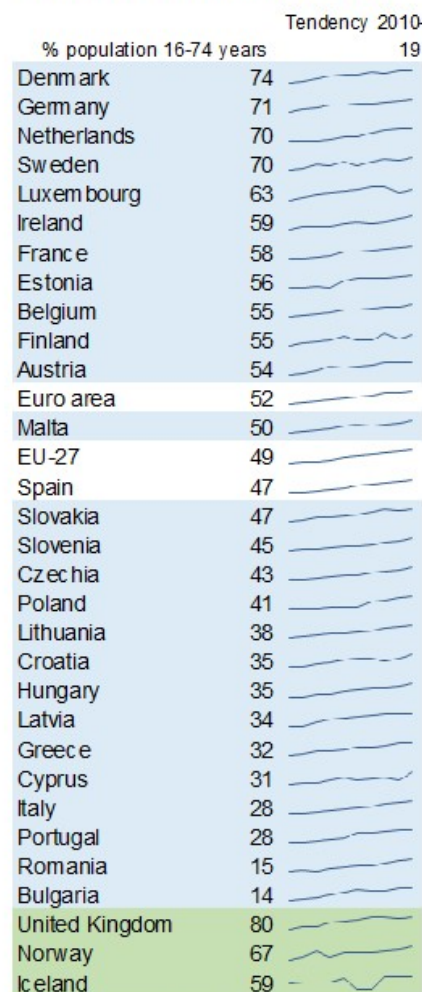
## Internet purchases by people between 65 and 74 years old (%). 2019



## What did they buy in the last year?

In the population aged 16 to 74 who bought online in the last 12 months, the most frequent product is vacation accommodation, followed by sports equipment and clothing, tickets for shows and other travel services (tickets, car hire...).

## Bought in the last 3 months. 2019



Source: Eurostat, isoc\_ec\_ibuy

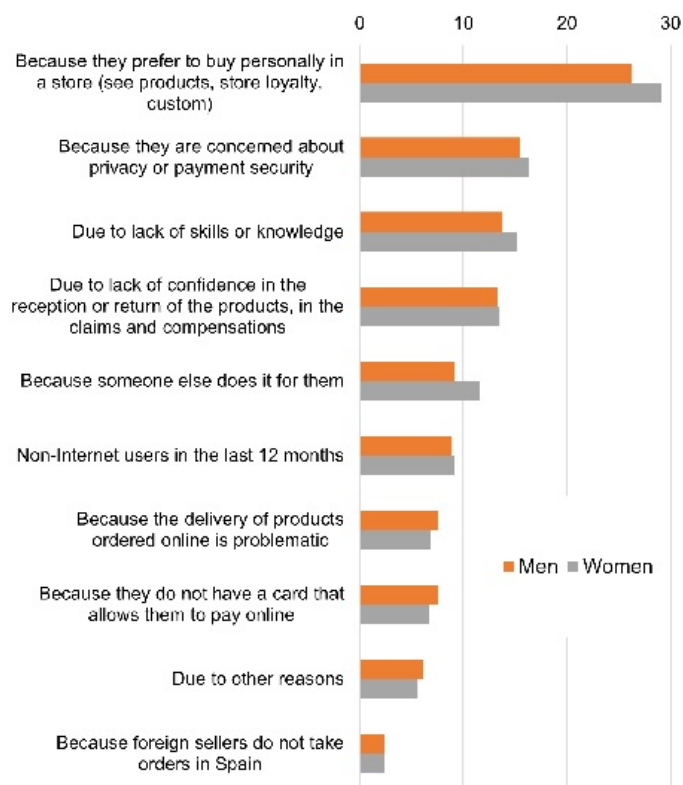


## Few seniors buy online

According to the same survey, 3.6% of people aged 75 and older bought online in the last 3 months (4.7% of men and 2.8% of women). Purchases also decreased as the age group increased: 4.4% between 75- and 84-year-olds, and 1.8% from 85 onwards.

For people aged between 65 and 74, the percentage rises to 13%, but is almost half the Eurozone average (24%). What they buy most through this channel are travel and vacation accommodation.

## Reasons for not making online purchases in the last 12 months. 2019 (%)



### Why don't they buy?

The main reason why both men and women do not buy online is because they prefer to do so physically in a store (see products, store loyalty, habits...), with a slightly higher percentage among women (29.1% vs. 26.3%).

The second most common reason is because they are concerned about privacy or payment security, and the third one is a lack of skill or knowledge.

There is also a significant gap in delegating these purchases to someone else ("because someone else is doing it for me") in favor of women (11.6% vs. 9.2%).

### The largest expenditure is on leisure and culture

One in three households made some purchase online in the last year (32.5%), according to the Household Budget Survey. These purchases concentrated 2.1% of all household consumption expenditure in 2019, almost one percentage more than three years ago.

The sections with the highest proportion of expenditure online were Leisure and culture (representing 10.9% of the total expenditure on this group), Clothing and footwear (4.4%), Restaurants and hotels (4.2%) and Transport (3.7%). These figures can be interpreted as the degree of insertion of online commerce in each spending group.

Meanwhile, the Leisure and culture group also has the greatest share in the distribution of all online consumer expenditure in households (28.6% of the total), followed by Transport (22.9%), and Restaurants and hotels (19.8%).

### Percentage of online expenditure



### Distribution of household online expenditure, by expenditure group. 2019

