MORE THAN RESEARCH

The Shopping Basket of **Spaniards**

April

2026

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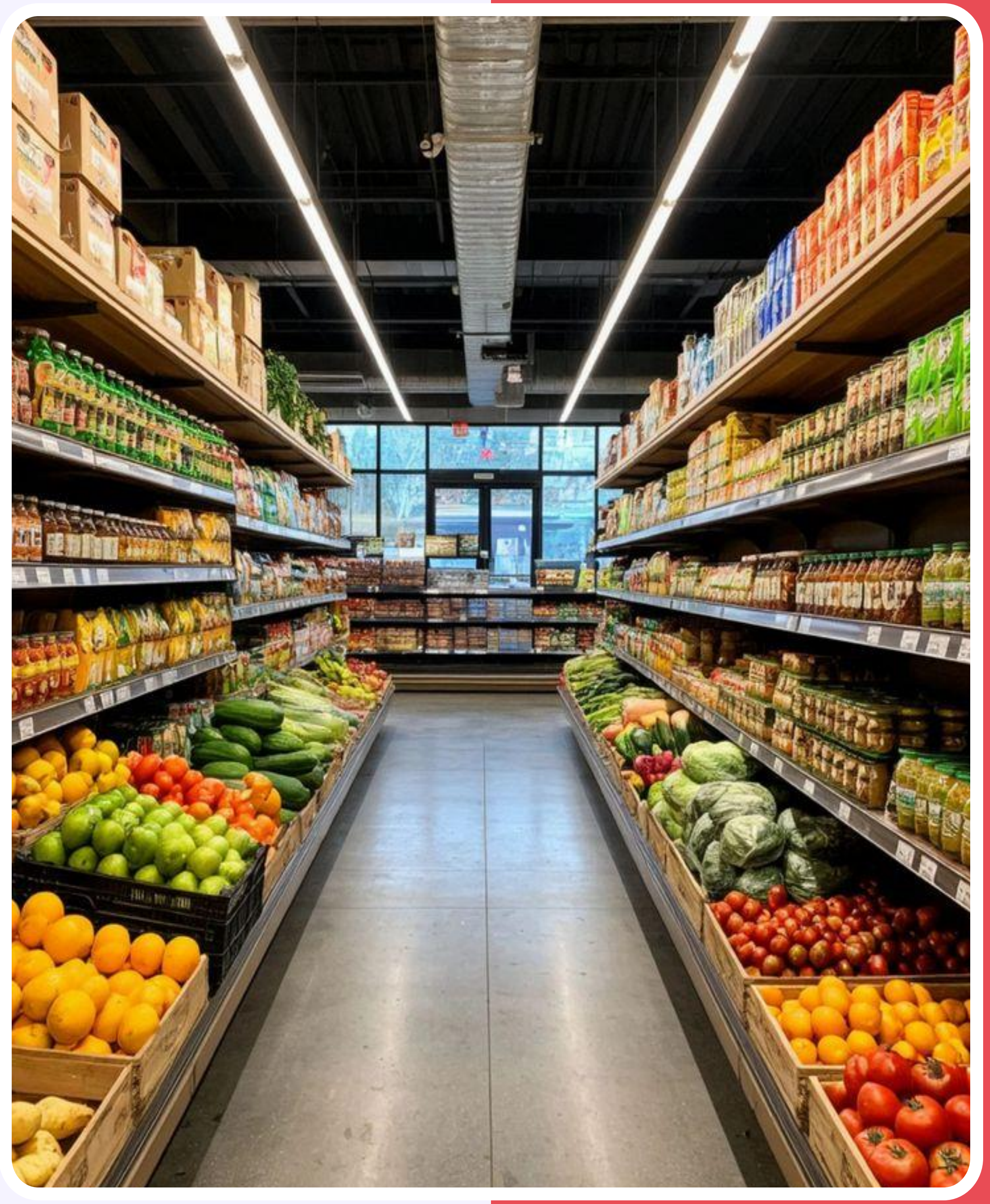
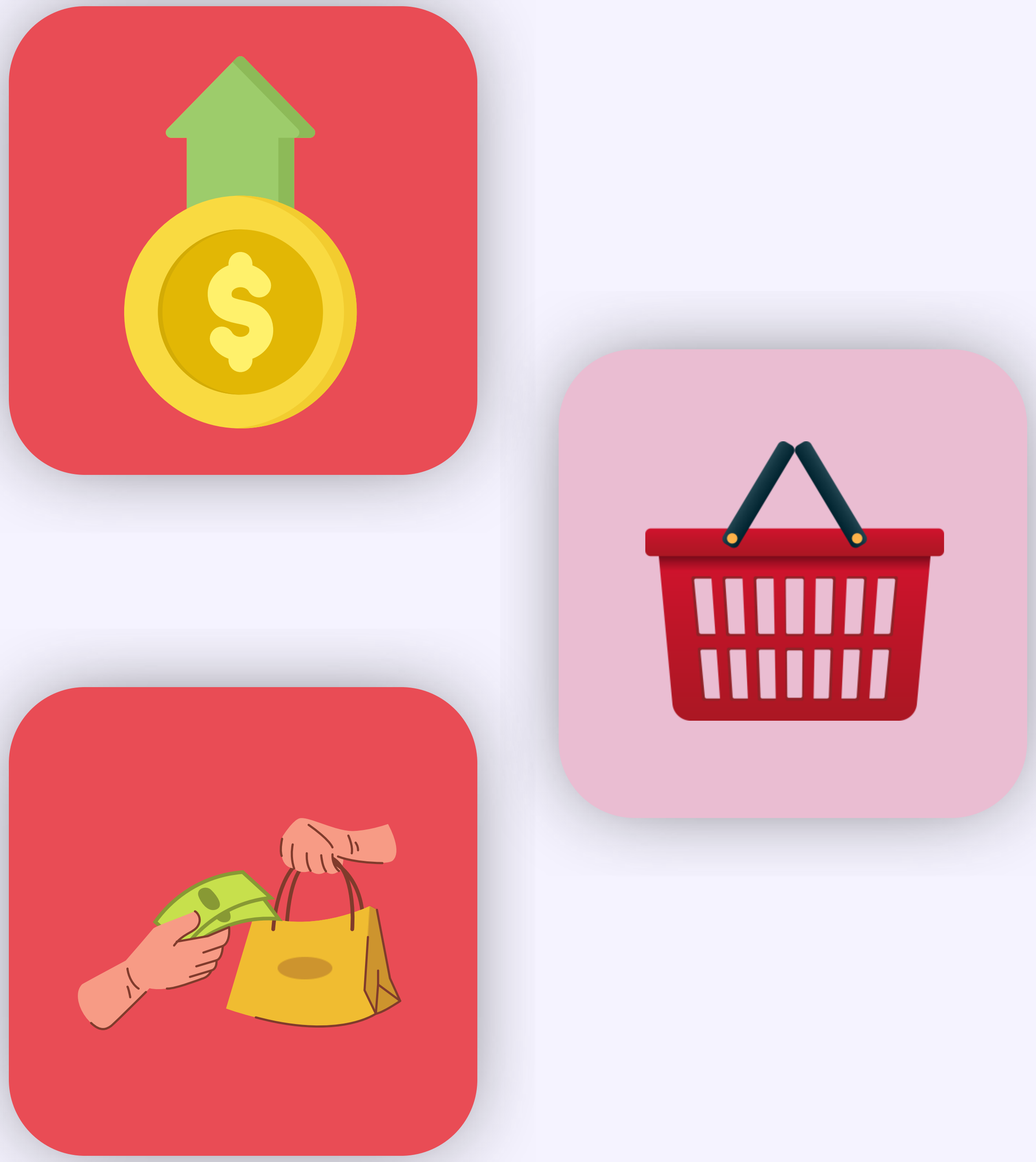


Background



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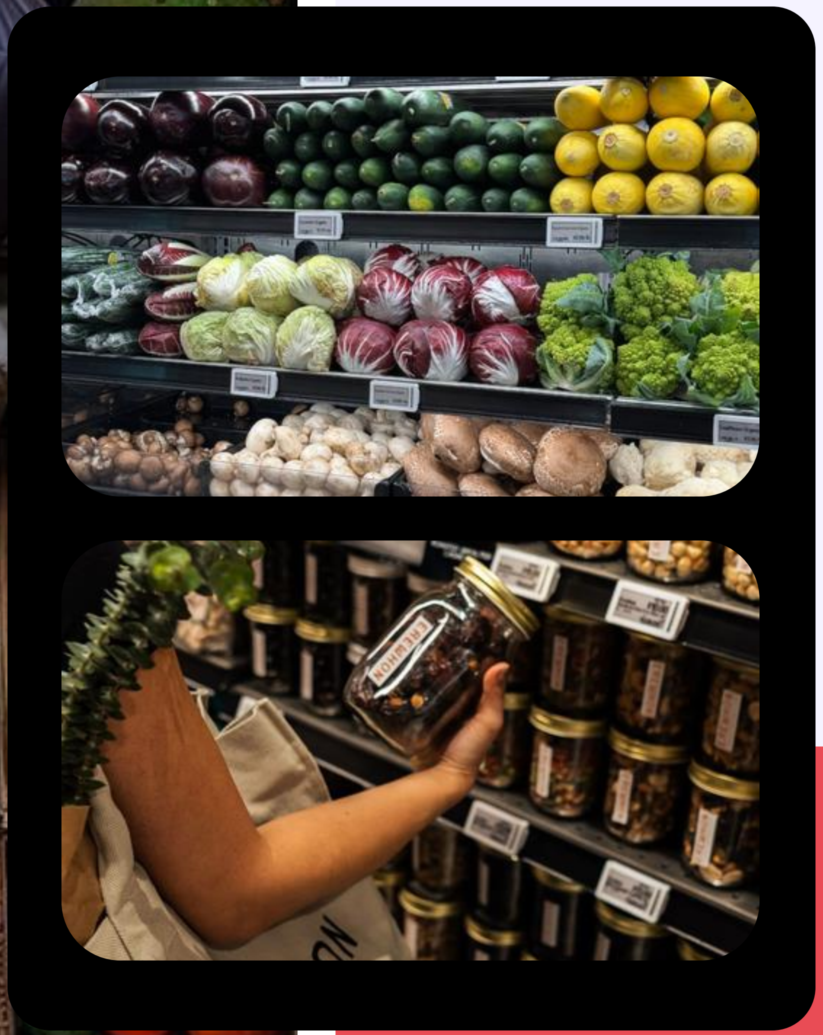
Background

01 The sustained increase in food and household product prices in recent years has transformed Spaniards' shopping habits, creating greater economic pressure on households.

02 In this context, MORE THAN RESEARCH has carried out a study to analyse Spanish consumer behaviour regarding the shopping basket, their saving strategies and their perception of price

03 The study gathers information on shopping habits, frequency, preferred places to shop and consumer attitudes towards promotions, private labels and switching stores.

04 The results addressing the stated objectives are presented below, with special attention to differences by generation and household economic situation.



Objectives

Objectives

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01
To understand the role of Spaniards in household purchase decision-making and their socioeconomic profile

02
To analyse the perceived economic situation of Spanish households and its recent evolution

03
To measure the level of stress generated by shopping prices and the actions taken to cope with expenses

04
To study shopping habits: frequency, number of stores visited and preferred places to shop

05
To explore consumer behaviour towards promotions: level of trust, perception and use

06
To identify the most valued saving strategies and expectations regarding the future evolution of shopping basket prices

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Methodology

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Technical Details

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Universe

Spanish population aged 18 to 75

Sample

1,000 interviews

Scope

National (Spain)

Technique

Online self-administered interview - CAWI

Fieldwork dates

April 2026

Questionnaire

Semi-structured, lasting approximately 7 minutes

Sampling Error

With a sample size of 1,000 interviews, the sampling error is estimated at +/- 3.16% for overall data, p=q=50, with a 95% confidence level

Anonymity and confidentiality

The complete anonymity of respondents' answers is guaranteed. Responses will be used solely for the preparation of statistical tables

Quality Control

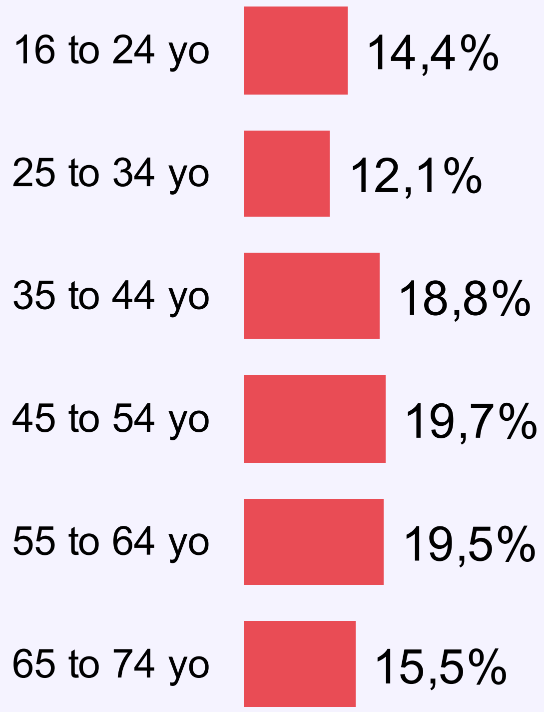
In accordance with ISO 20252 and the ICC/ESOMAR Code of Conduct.

Results

Sample composition

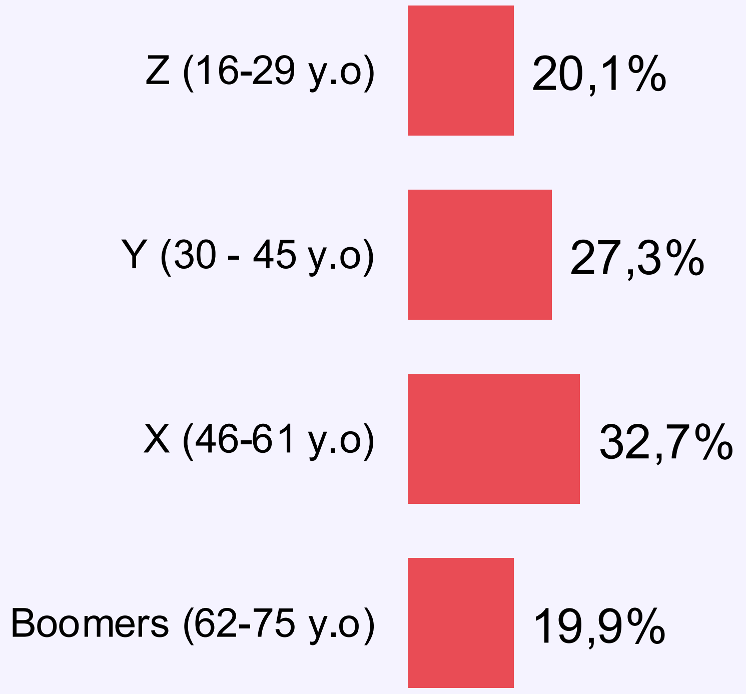
Sex

Age

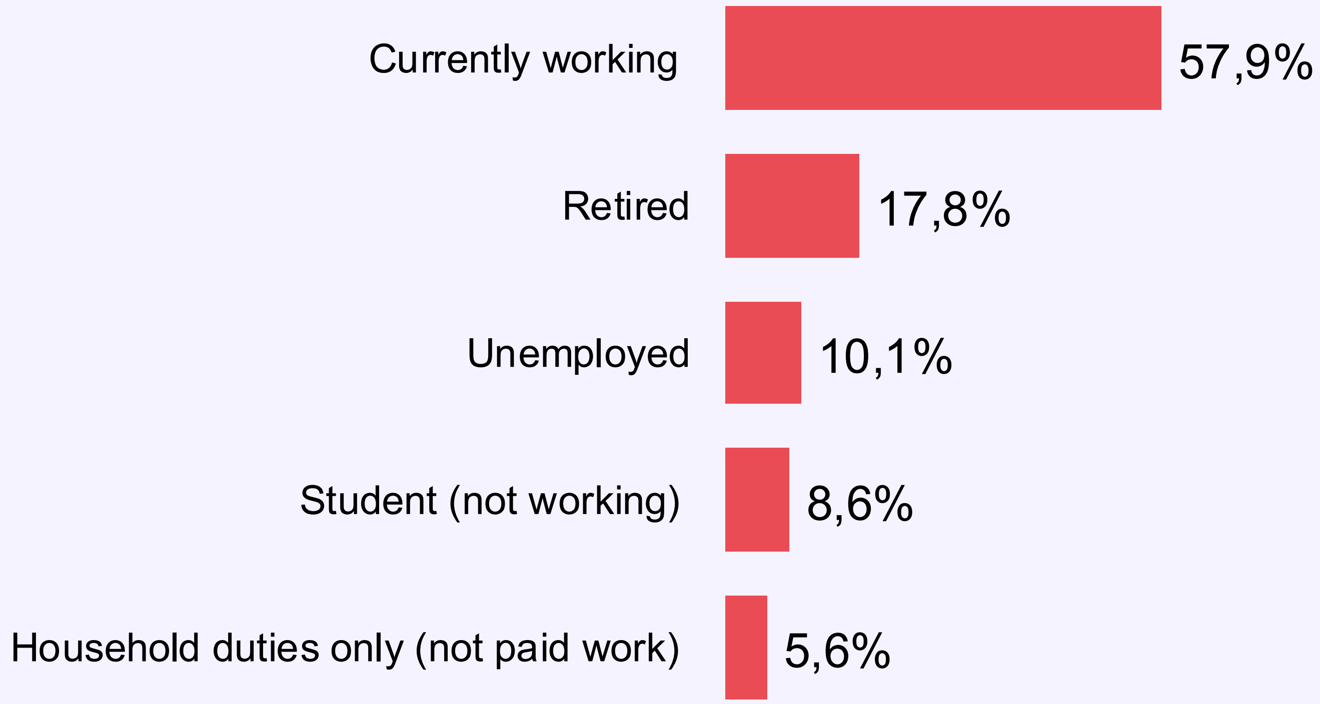


Average: 46 years old

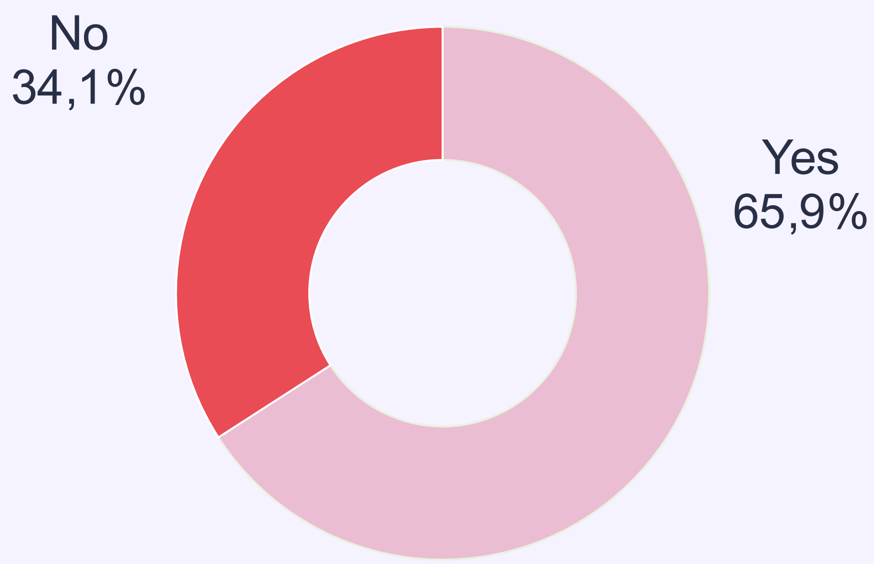
Generation



Employment status

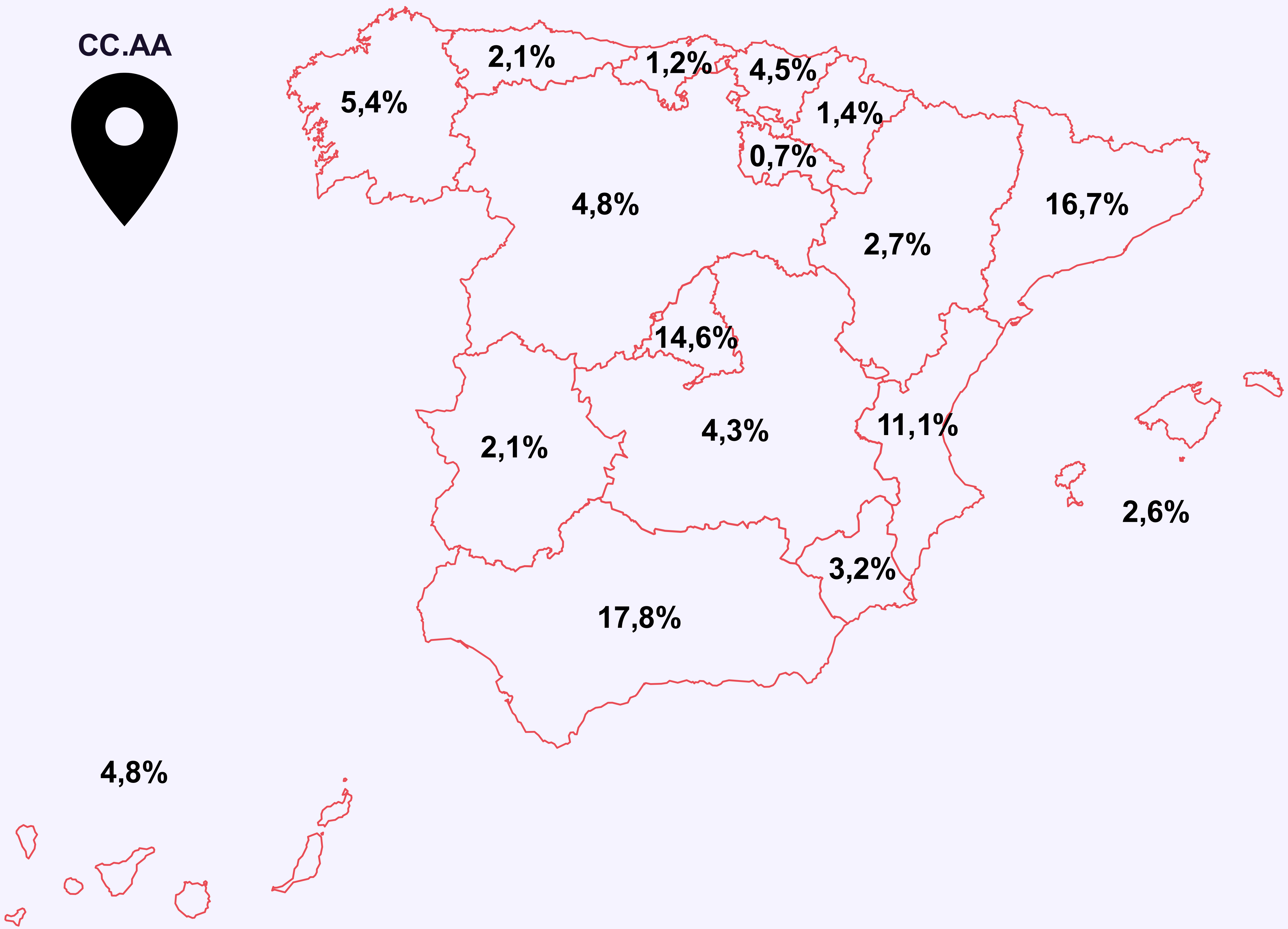


Head of household



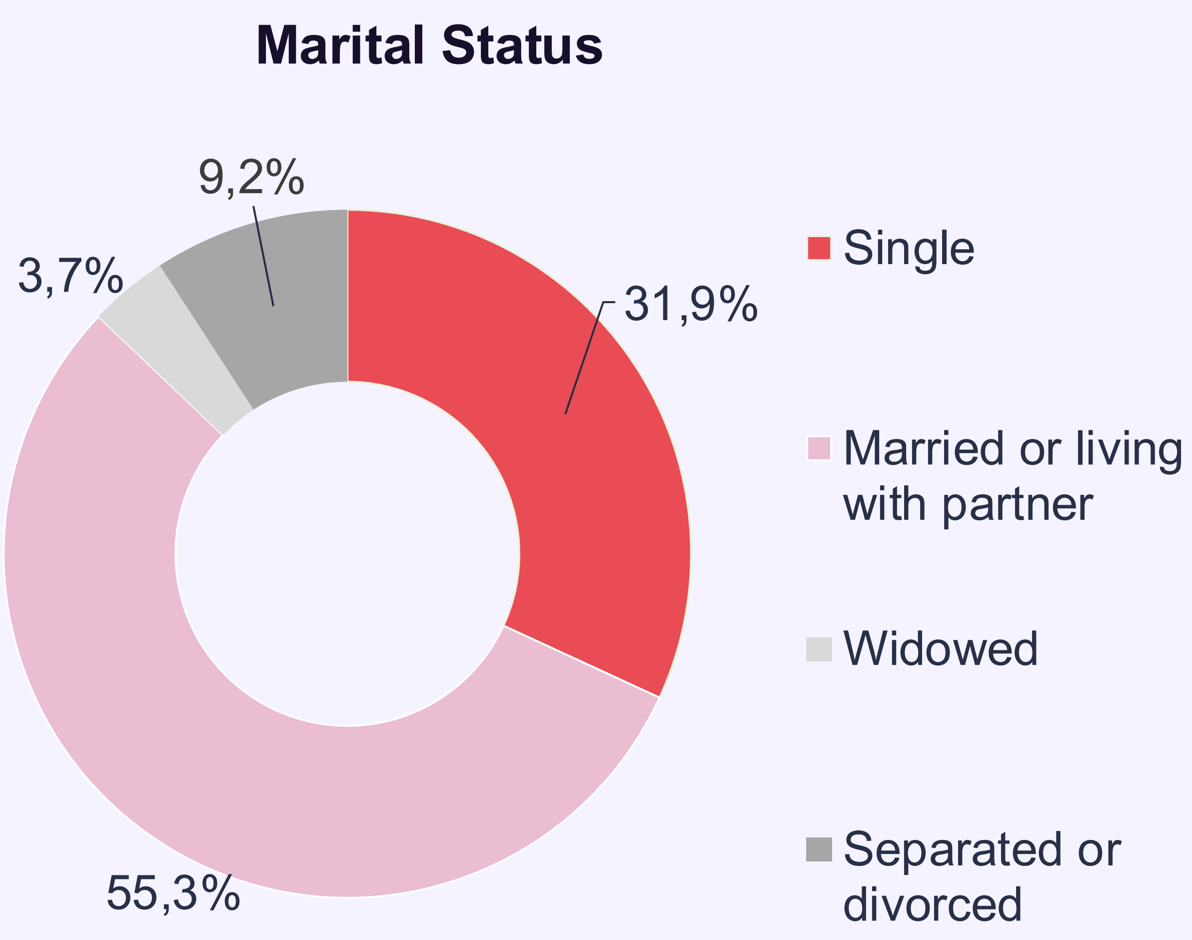
Base: 1,000 interviews

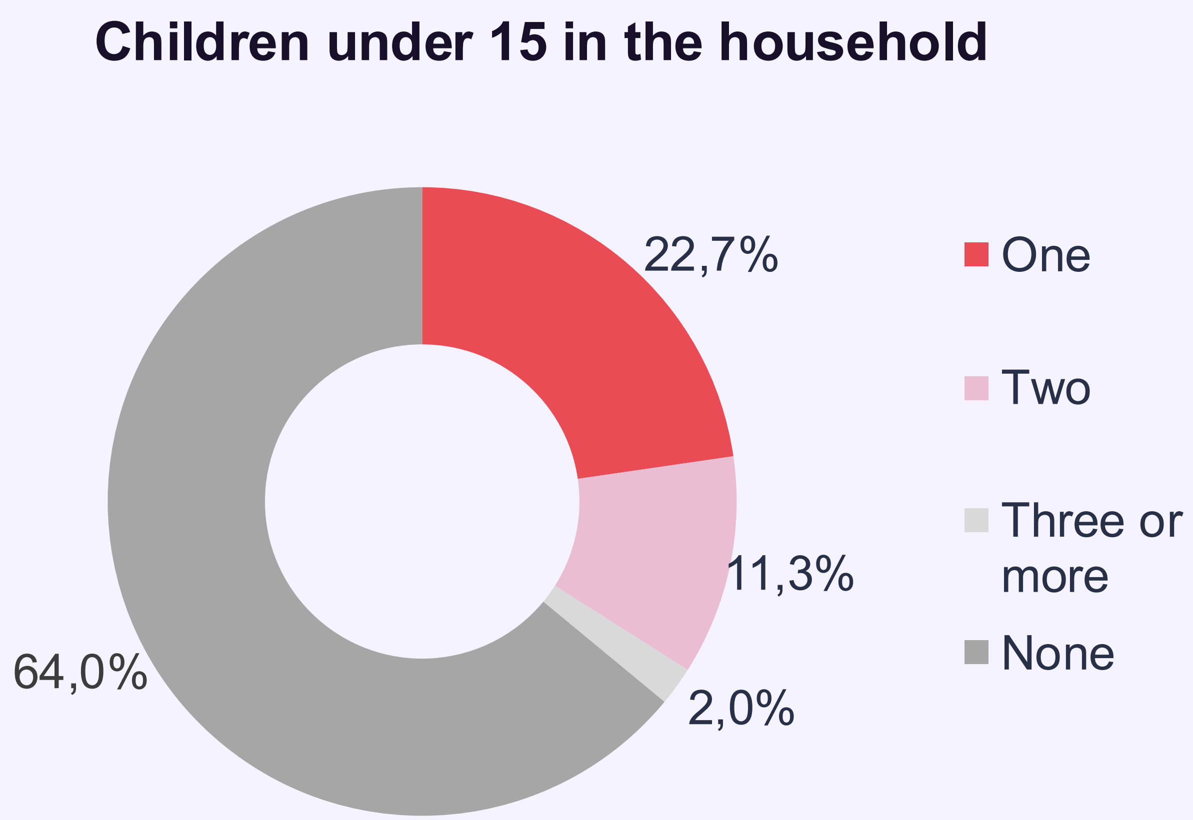
Sample composition

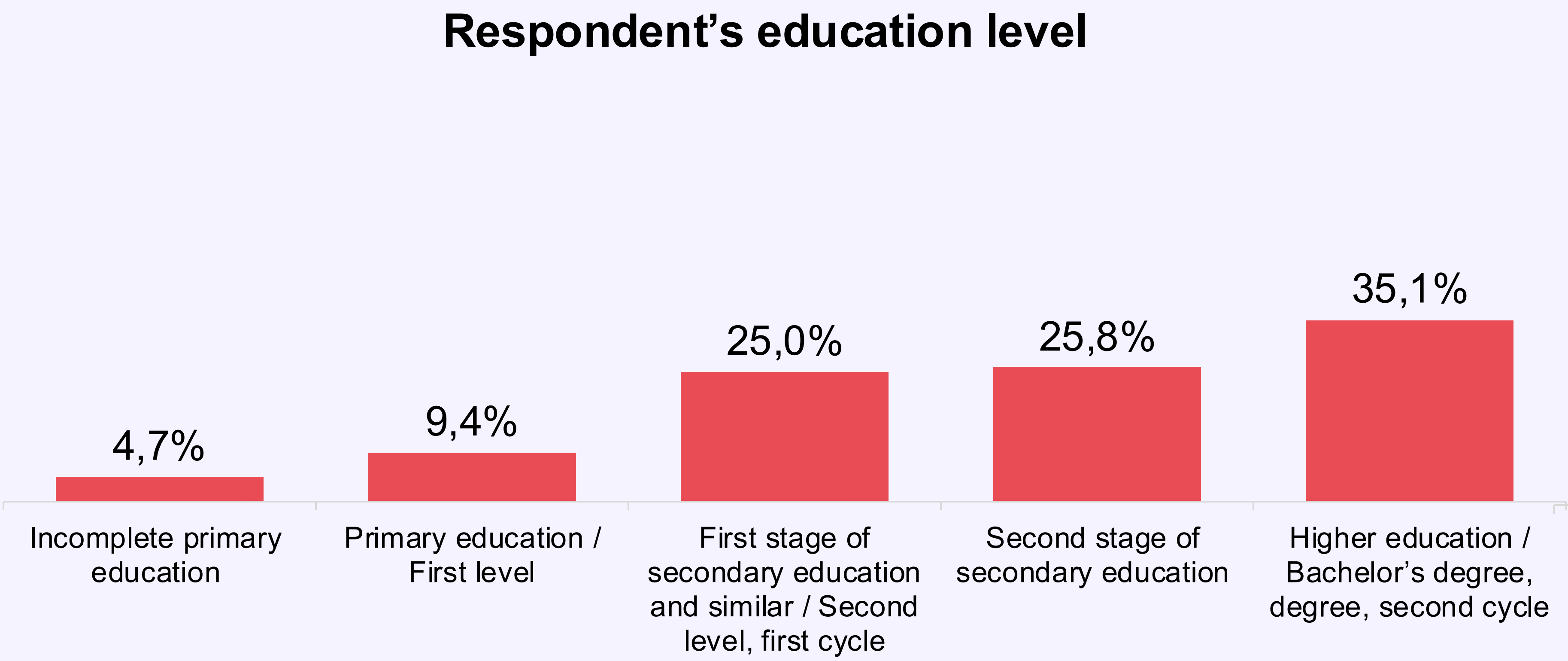


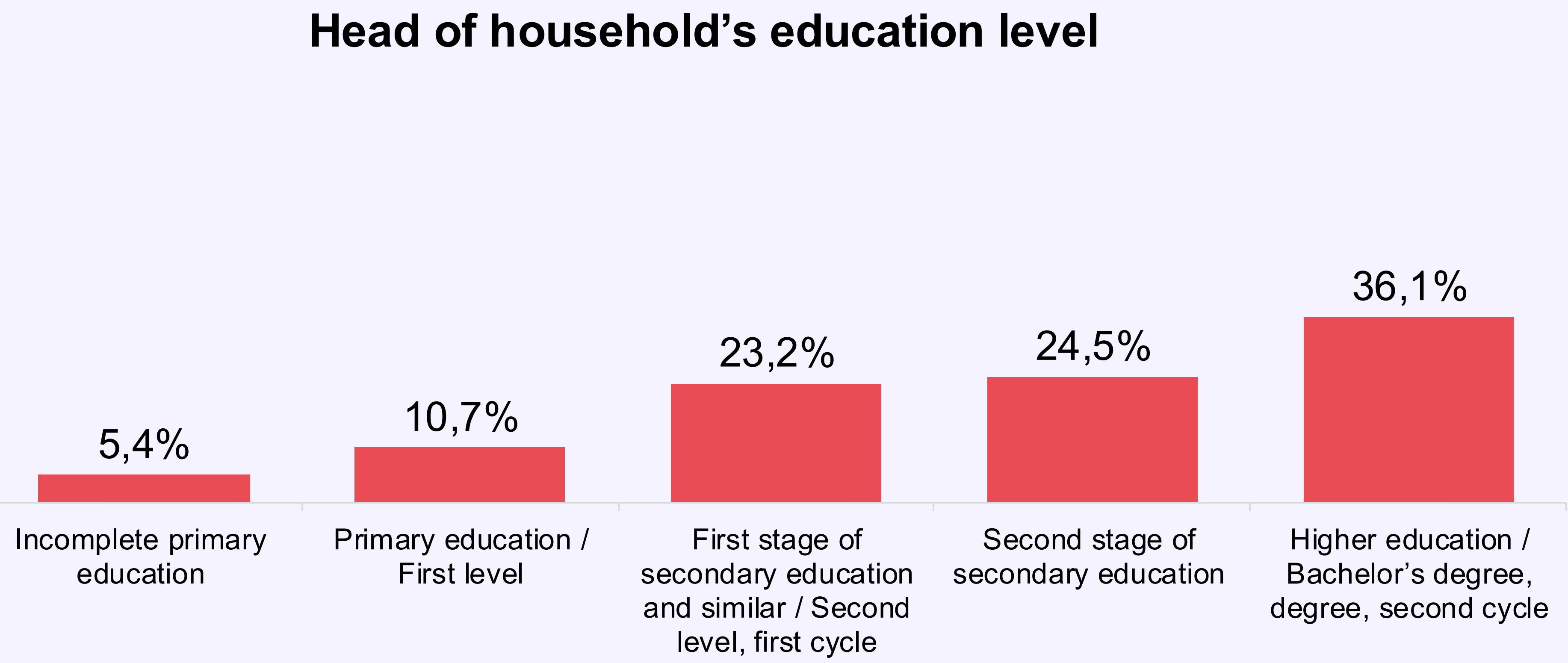
Base: 1,000 interviews

Sample composition









Base: 1,000 interviews

Role in Household Shopping

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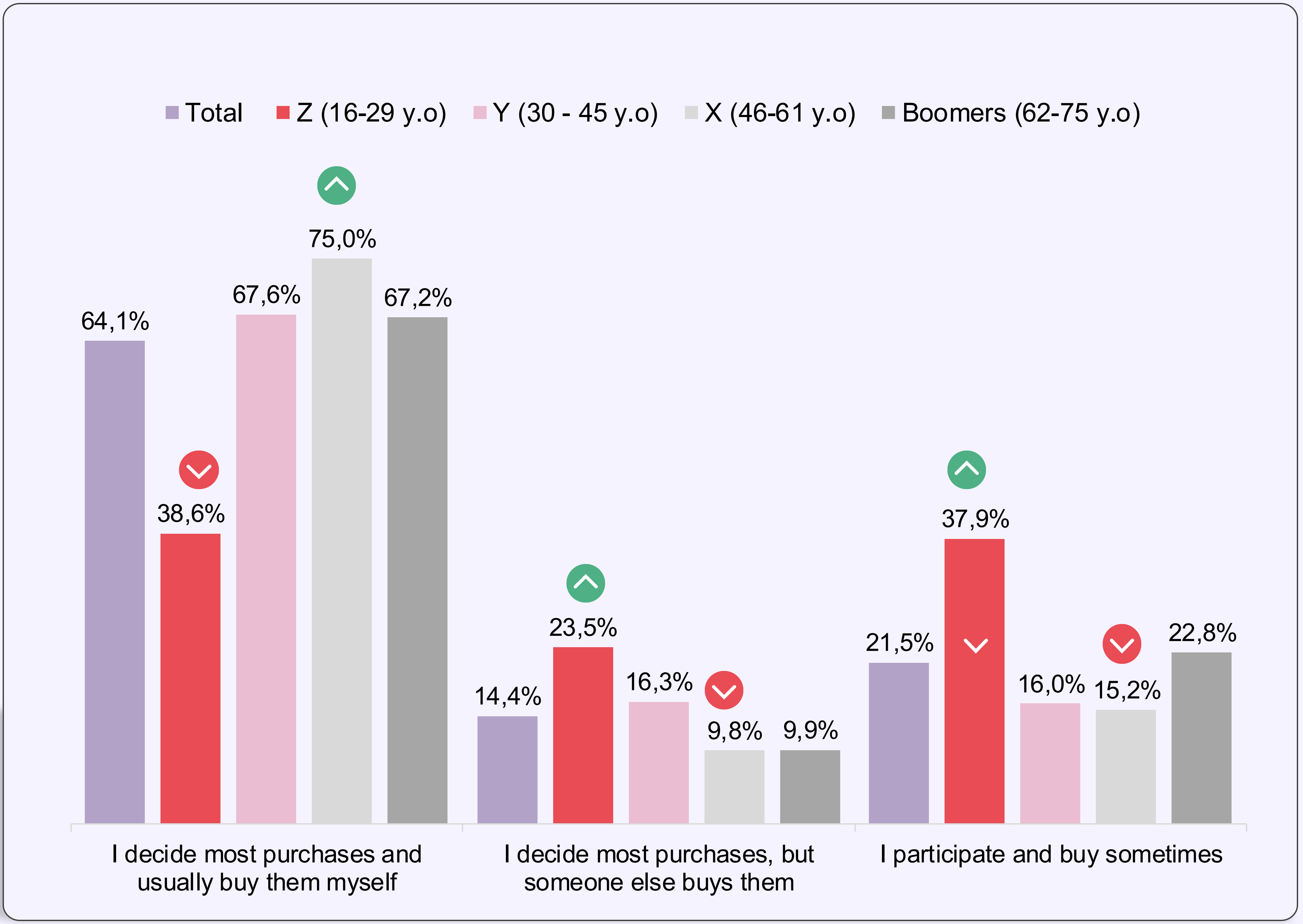
The majority of the population plays an active role in household shopping, either deciding and buying themselves or participating regularly. All generations except Gen Z identify as the main decision-makers and regular buyers, while Gen Z stands out for sharing or delegating this responsibility more often

By gender, women assume the role of main decision-maker and buyer to a greater extent than men (71.3% vs. 56.9%), a statistically significant difference.



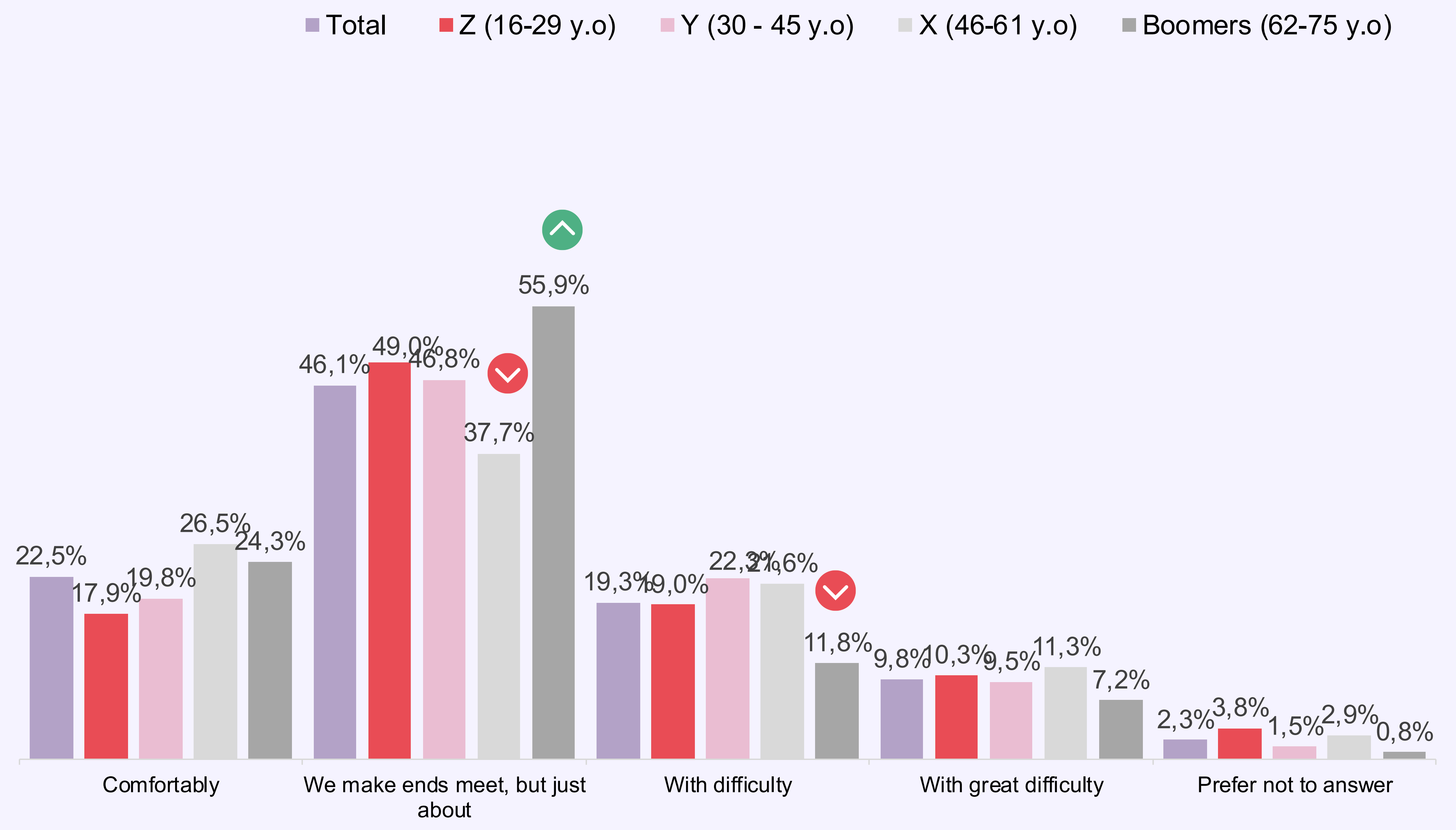
C2A1. What is your role in household shopping?

Base: 1,000 interviews

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

Household Finances



Base: 1,000 interviews

PB1. Thinking about your household finances, how are you currently making ends meet?

Although most Spaniards say they make it to the end of the month, albeit just about, nearly 3 in 10 do so with difficulty

By generation, Boomers are the most likely to say they are getting by "just about" (55.9%), a significant difference compared with the rest. At the same time, they accumulate the least economic strain, with the lowest proportions reporting difficulty. At the opposite end, Generation X and Gen Y are the groups most likely to say they are making ends meet with difficulty.

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

Economic Situation

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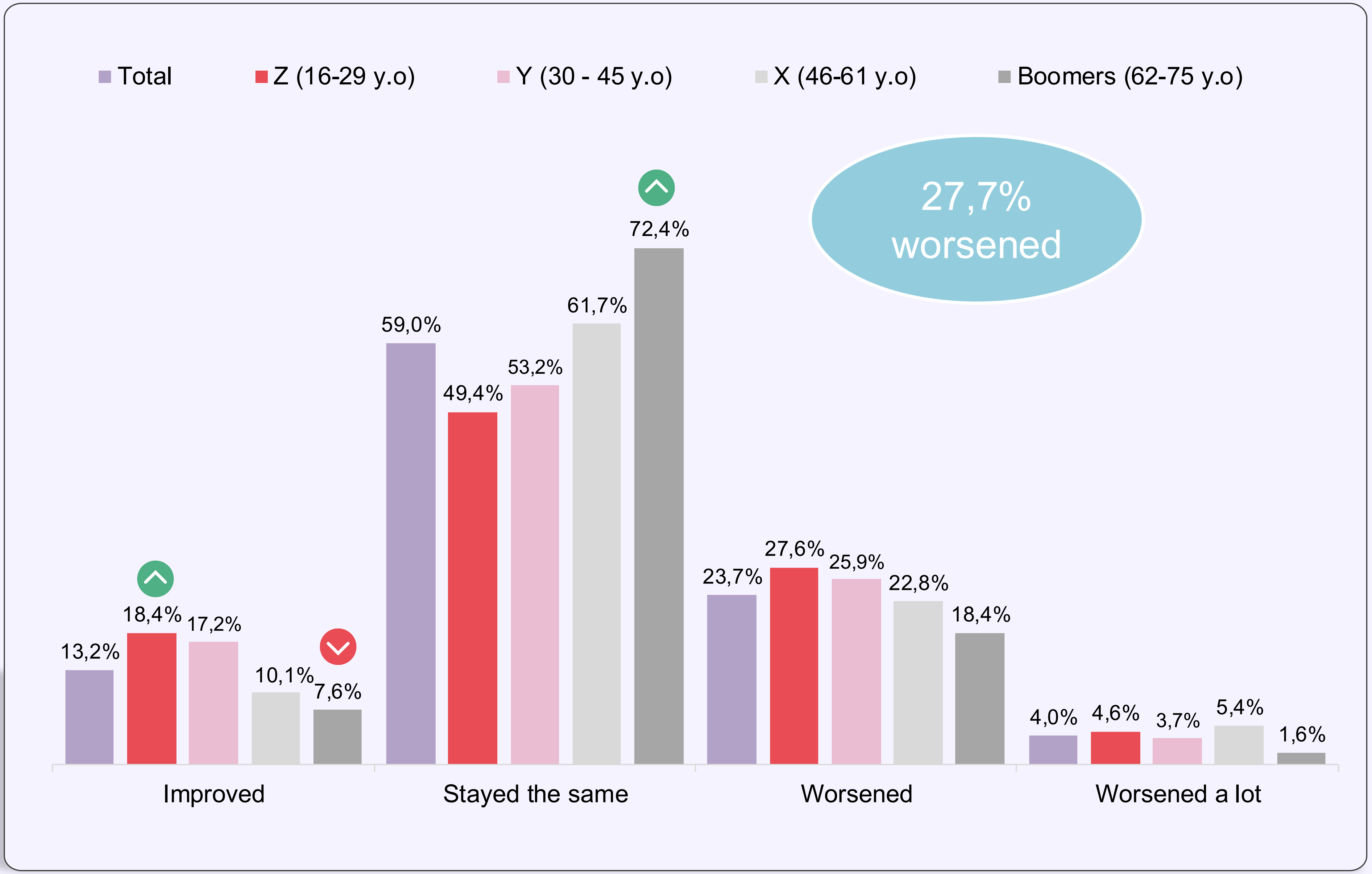
For more than a quarter of Spaniards, their economic situation has worsened over the last three months. By contrast, for just over 10%, the situation improved.

By generation, perceived worsening is inversely proportional to age: 32.2% of Gen Z and 29.6% of Gen Y say their situation has worsened, compared with 20% of Boomers. For 3 in 4 individuals in this generation, the economic situation has not changed.



PB2. In the last 3 months, your economic situation has...

Base: 1,000 interviews

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

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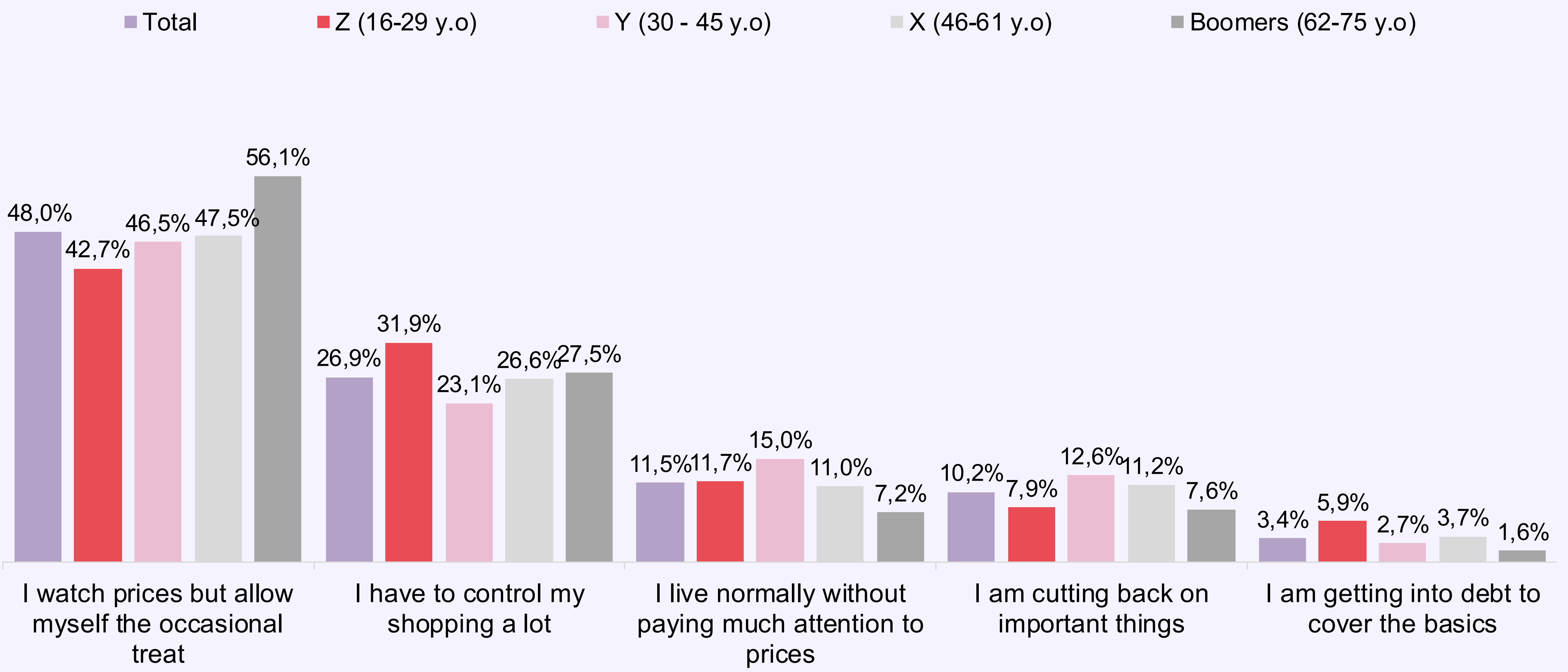
Attitude Towards Shopping



Although the economic situation is not at its best, Spaniards still allow themselves the occasional treat. Almost half of the population says they do not deprive themselves of the occasional treat, but they do keep an eye on prices.

Attitudes towards shopping are polarised by generation: Boomers are the most relaxed, while Gen Z is the most pressured. Gen Y is the group most likely to say they are cutting back on important things.

PB3. Which of these statements best describes your situation?

Base: 1,000 interviews

Significantly higher differences are compared with the total sample

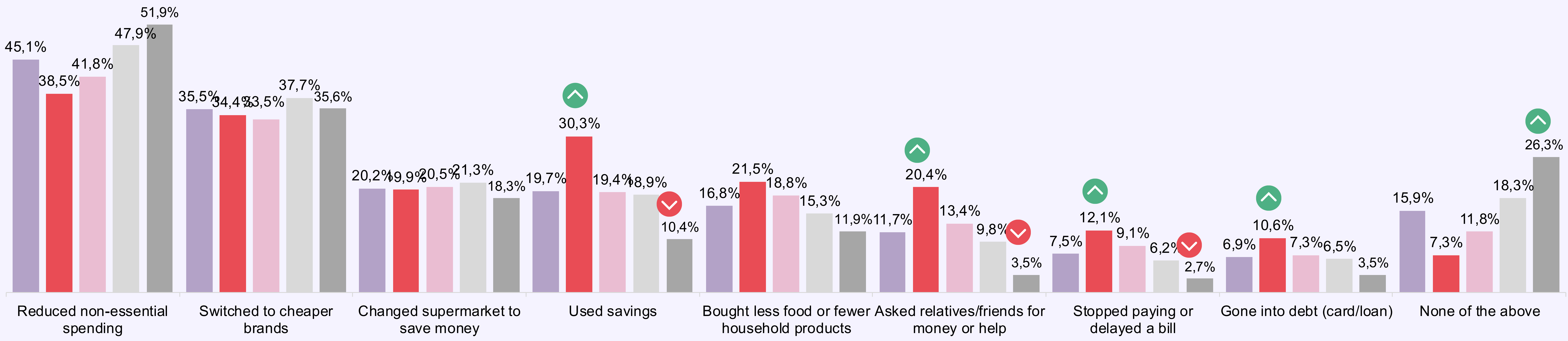
Significantly /lower differences are compared with the total sample

Actions to Cope with Expenses

Spaniards have tightened their belts to a greater or lesser extent in the last three months. Almost half acknowledge that they have reduced non-essential spending; just over a third openly admit that they have switched to cheaper brands; and 20% have changed store to save money or have dipped into savings

Gen Z is the group that has most often used savings (30.3%), asked relatives for money (20.4%), delayed paying bills (12.1%) or directly taken on debt (10.6%)

Only 7.3% of Gen Z have taken none of these measures, while just over a quarter of Boomers did nothing.



Base: 1,000 interviews

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

PB4. In the last 3 months, have you done any of the following to cope with your expenses?

Stress Generated by Shopping Prices

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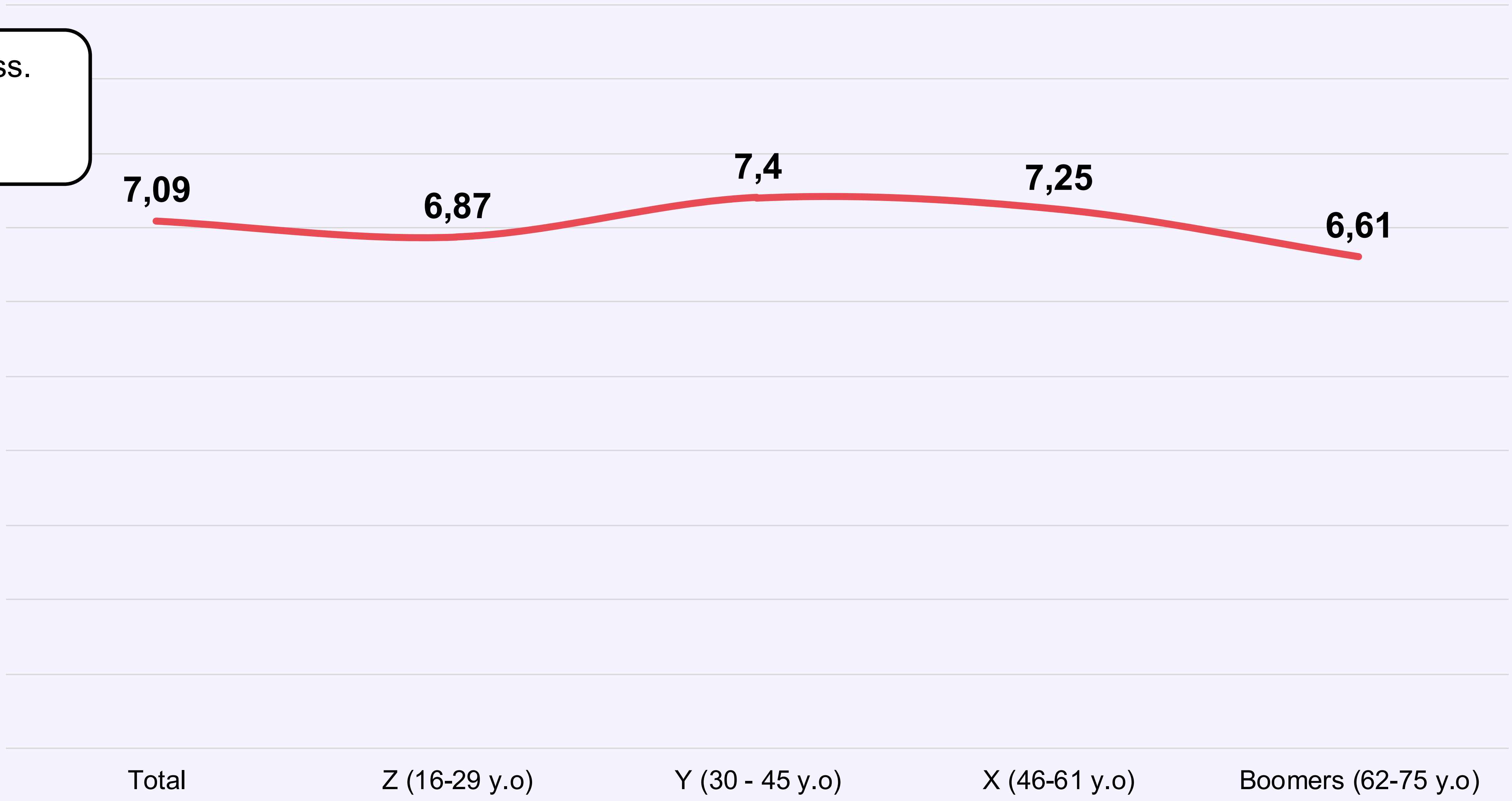
Shopping prices create considerable stress. On a scale from 0 to 10, the stress level among Spaniards is 7.1

Generation Y reports the highest stress (7.4), followed closely by Generation X (7.25). The generational extremes, Z (6.87) and Boomers (6.61), show somewhat lower but still high levels



PB5. On a scale from 0 to 10, how much stress does the price of shopping currently generate for you?

Base: 1,000 interviews

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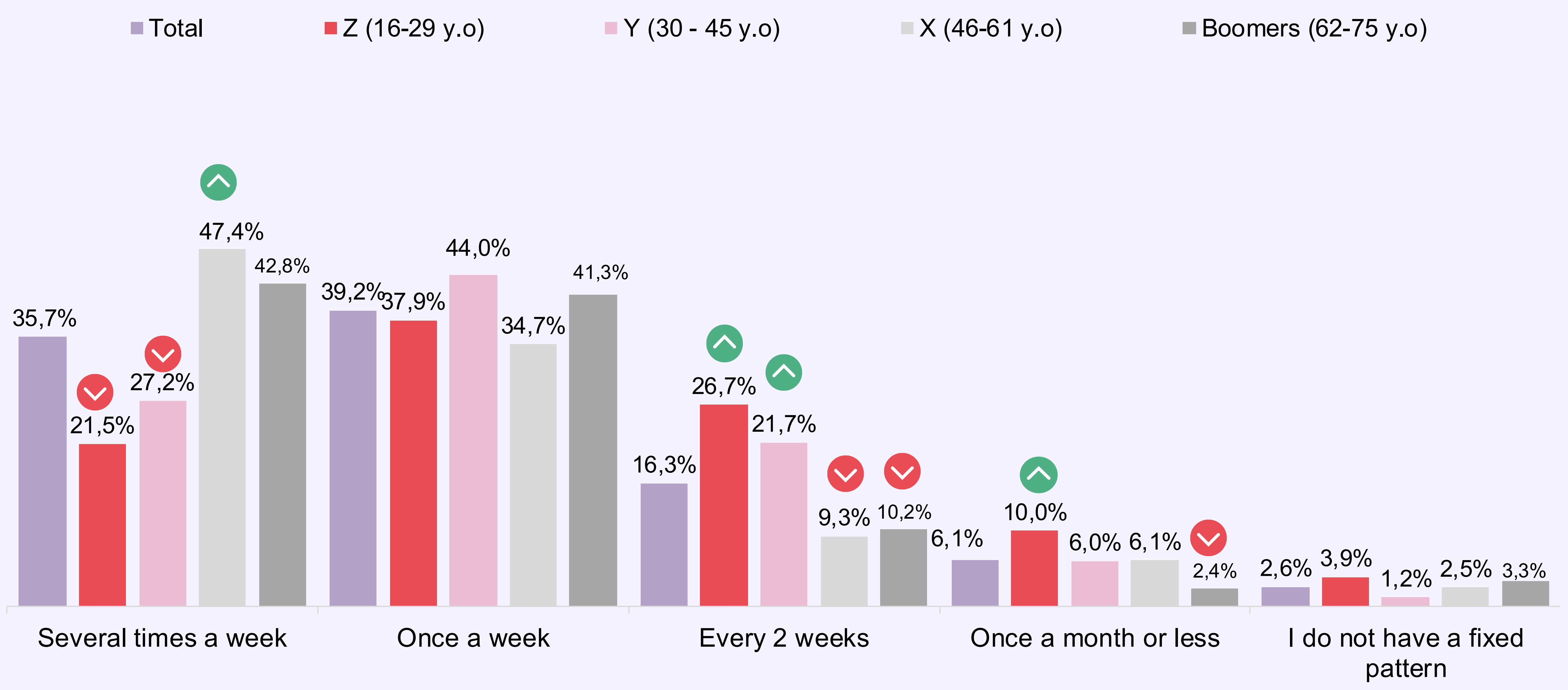
Shopping Frequency



75% of Spaniards usually shop very frequently: 36% go shopping several times a week and 39% once a week. But this changes radically depending on generation. Gen X and Boomers shop most often, while among young people aged 16-34 the percentage who shop more sporadically increases

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

PC1. How often do you shop for food and household products?

Base: 1,000 interviews

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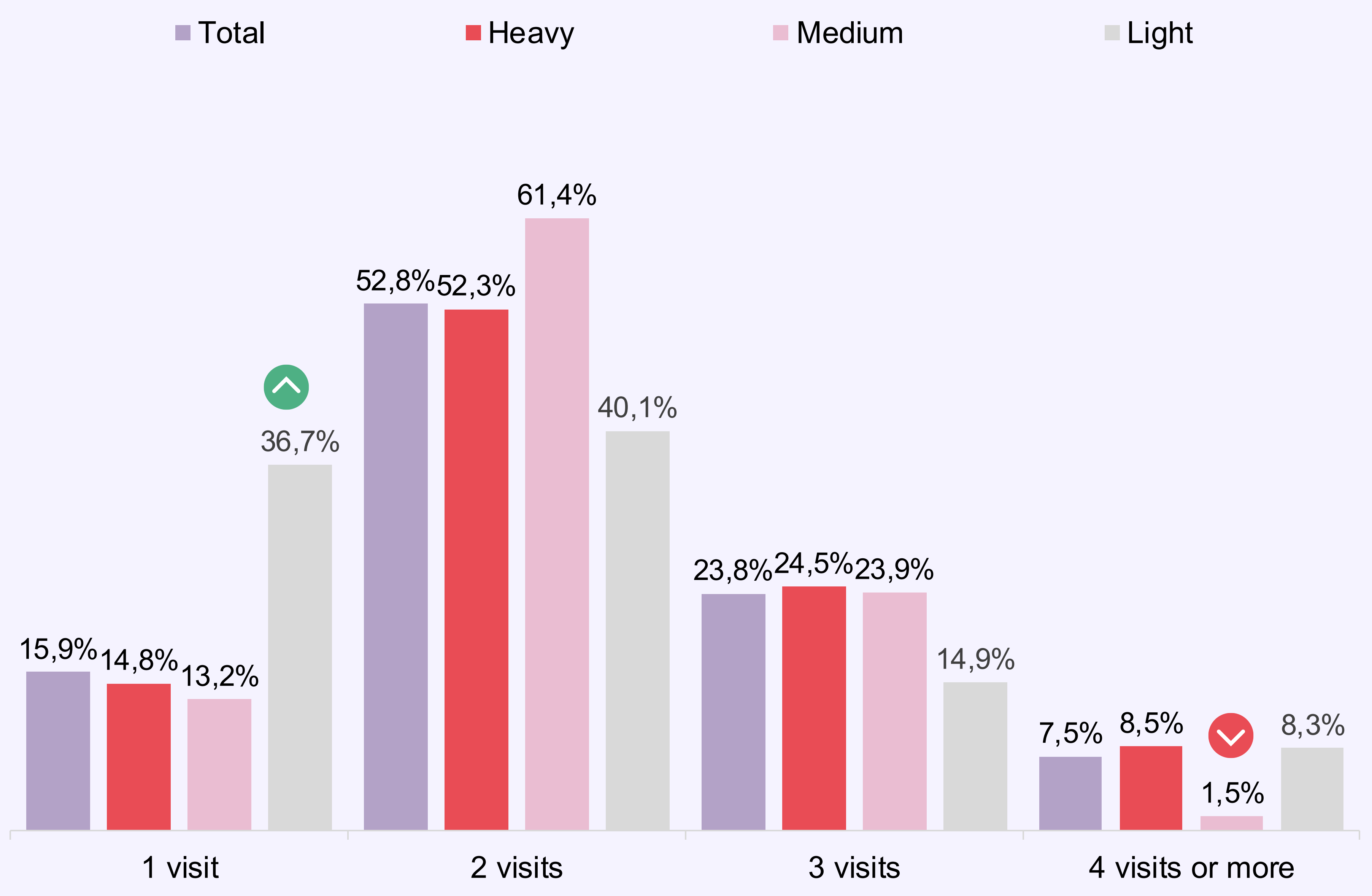
Number of Stores Visited



Most shoppers visit an average of two stores in a week, regardless of their shopping frequency. Medium-frequency shoppers, who shop every two weeks, barely visit four or more stores (1.5%), concentrating their visits in two outlets. Light shoppers, who shop once a month or less, are the most dispersed, with a higher weight of only one visit (36.7%).

Significantly higher differences are compared with the total sample
Significantly /lower differences are compared with the total sample

Heavy (shops once or several times a week)
Medium (shops once every 2 weeks)
Light (shops once a month or less)

PC2. Approximately how many different stores do you visit in a normal week to do household shopping?

Base: 1,000 interviews

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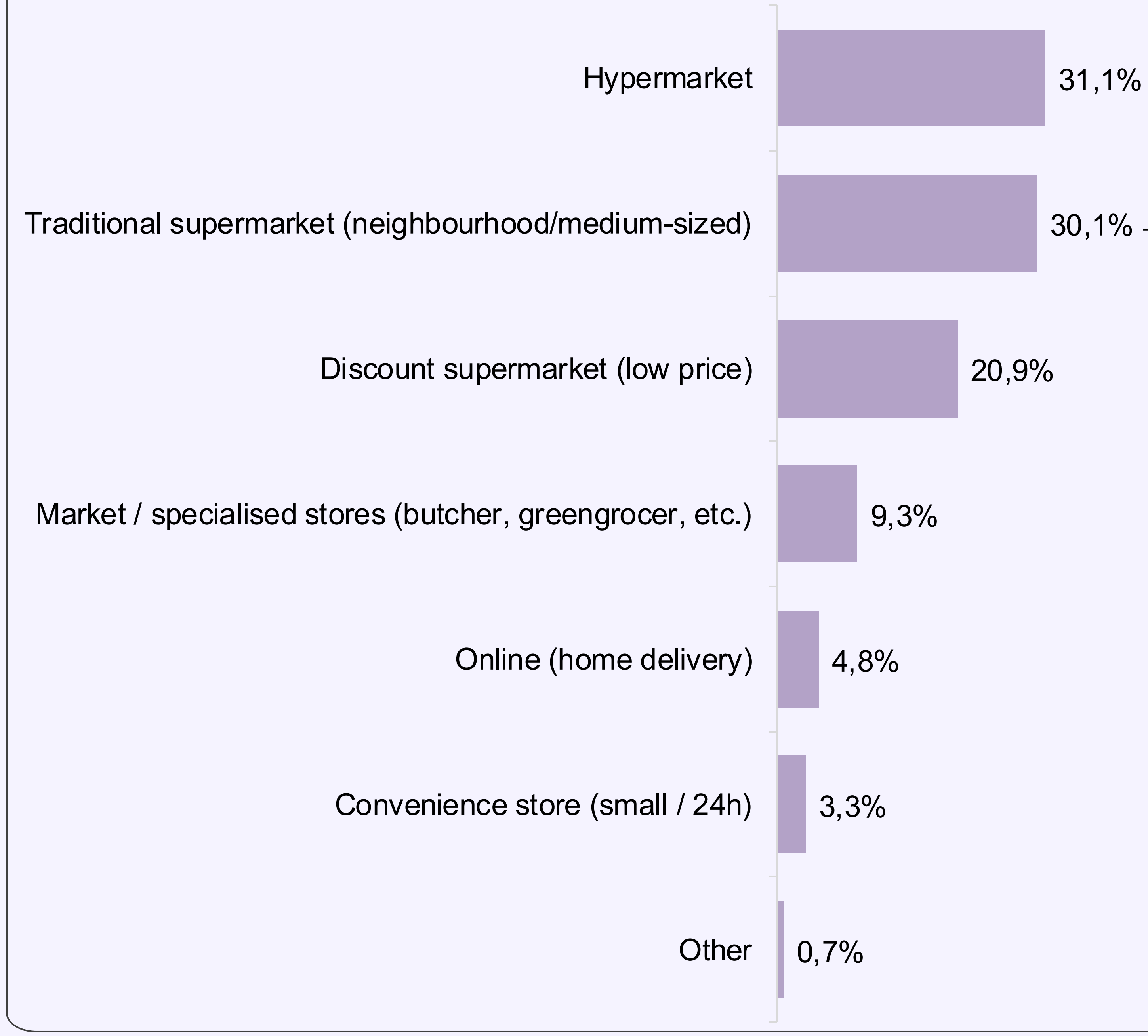
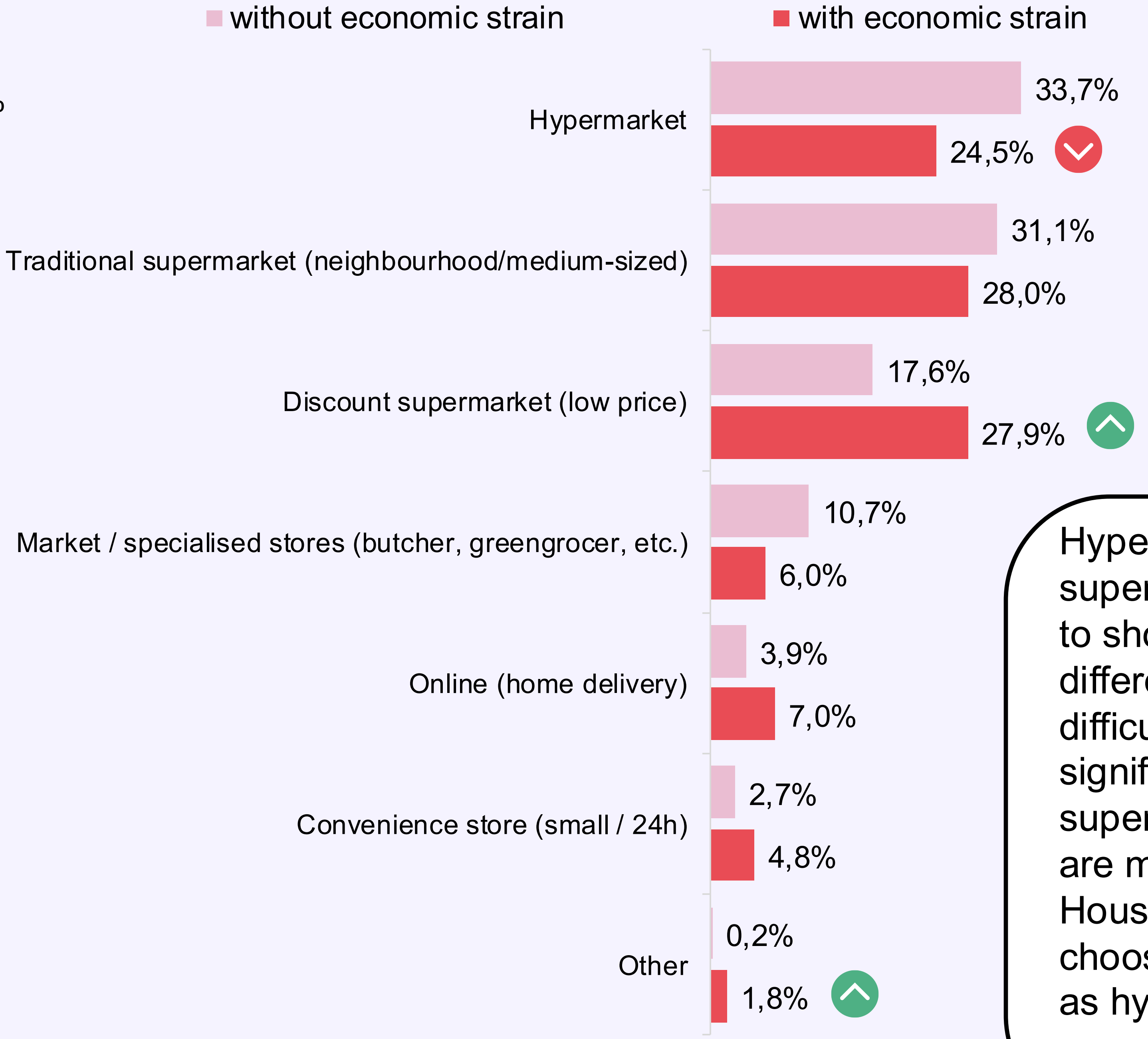
Places of Purchase





Hypermarkets and traditional supermarkets lead as the main places to shop. Economic strain marks clear differences: Spaniards who have difficulty making ends meet go significantly more often to discount supermarkets (27.9%) than those who are more comfortable (17.6%). Households without economic strain choose less economical options, such as hypermarkets or traditional supermarkets, to a greater extent

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

PC3. Where do you do MOST of your shopping?

Base: 1,000 interviews

"Without economic strain" (Comfortably or we make ends meet, but just about)

"With economic strain" (With difficulty or great difficulty)

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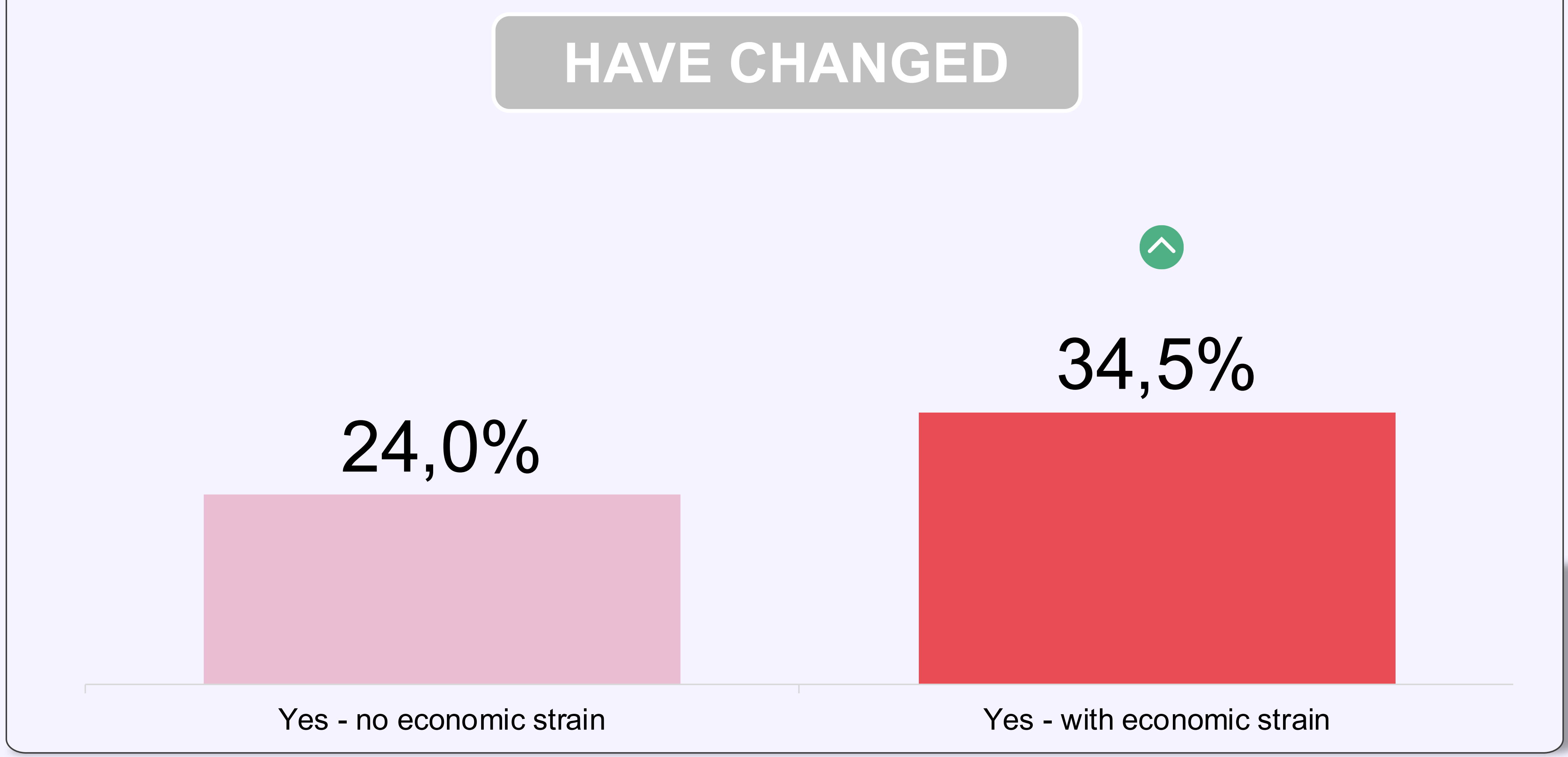
Changing Stores to Save Money

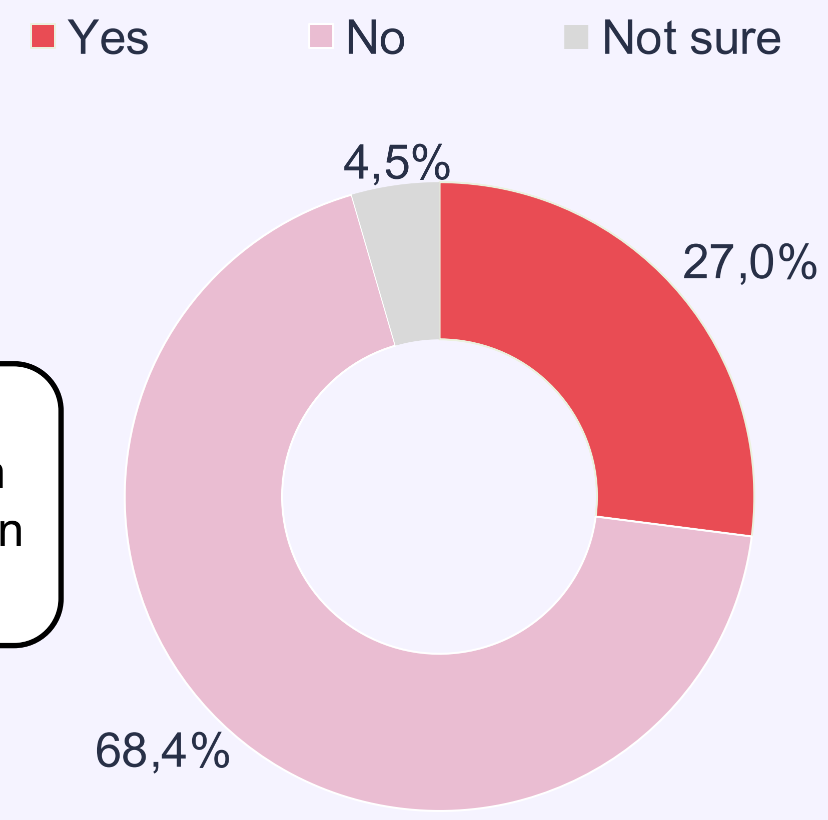
The economic situation acts as a cause for switching: those who have changed stores most to save money are those who are worse off at the end of the month (34.5%), 10 points more than those without economic strain



"Without economic strain" (Comfortably or we make ends meet, but just about)
"With economic strain" (With difficulty or great difficulty)

Significantly higher differences are compared with the total sample
Significantly lower differences are compared with the total sample

PC4. In the last 3 months, have you changed your main store to save money?



In general, Spaniards are quite loyal to their store: 7 in 10 have not changed store in the last three months.

Base: 1,000 interviews

Reasons for Changing Store

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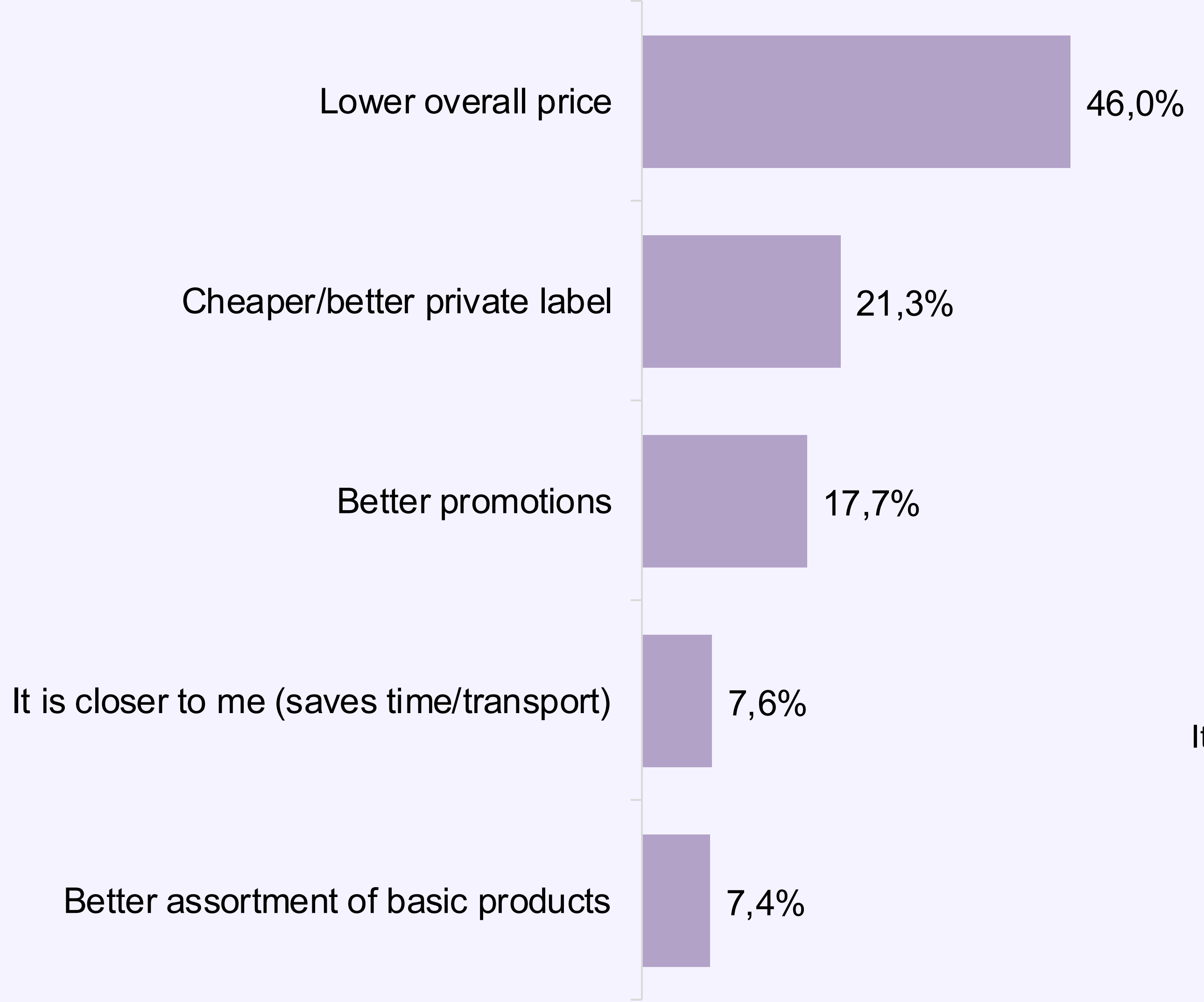
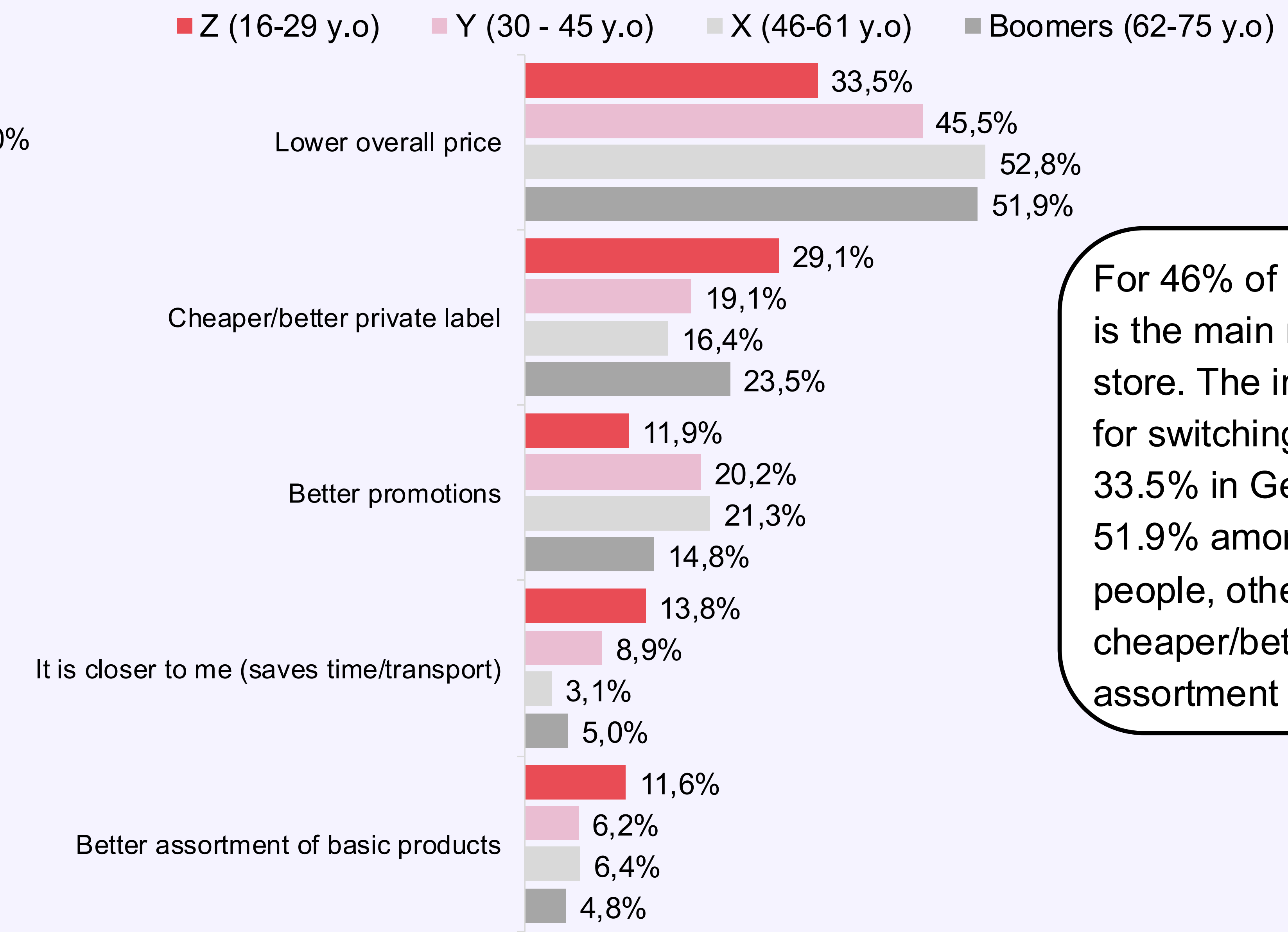




For 46% of Spaniards, a lower overall price is the main reason why they changed store. The importance of price as a reason for switching increases with age: from 33.5% in Gen Z to 52.8% in Gen X and 51.9% among Boomers. Among young people, other reasons also matter, such as cheaper/better private labels and the assortment of basic products.

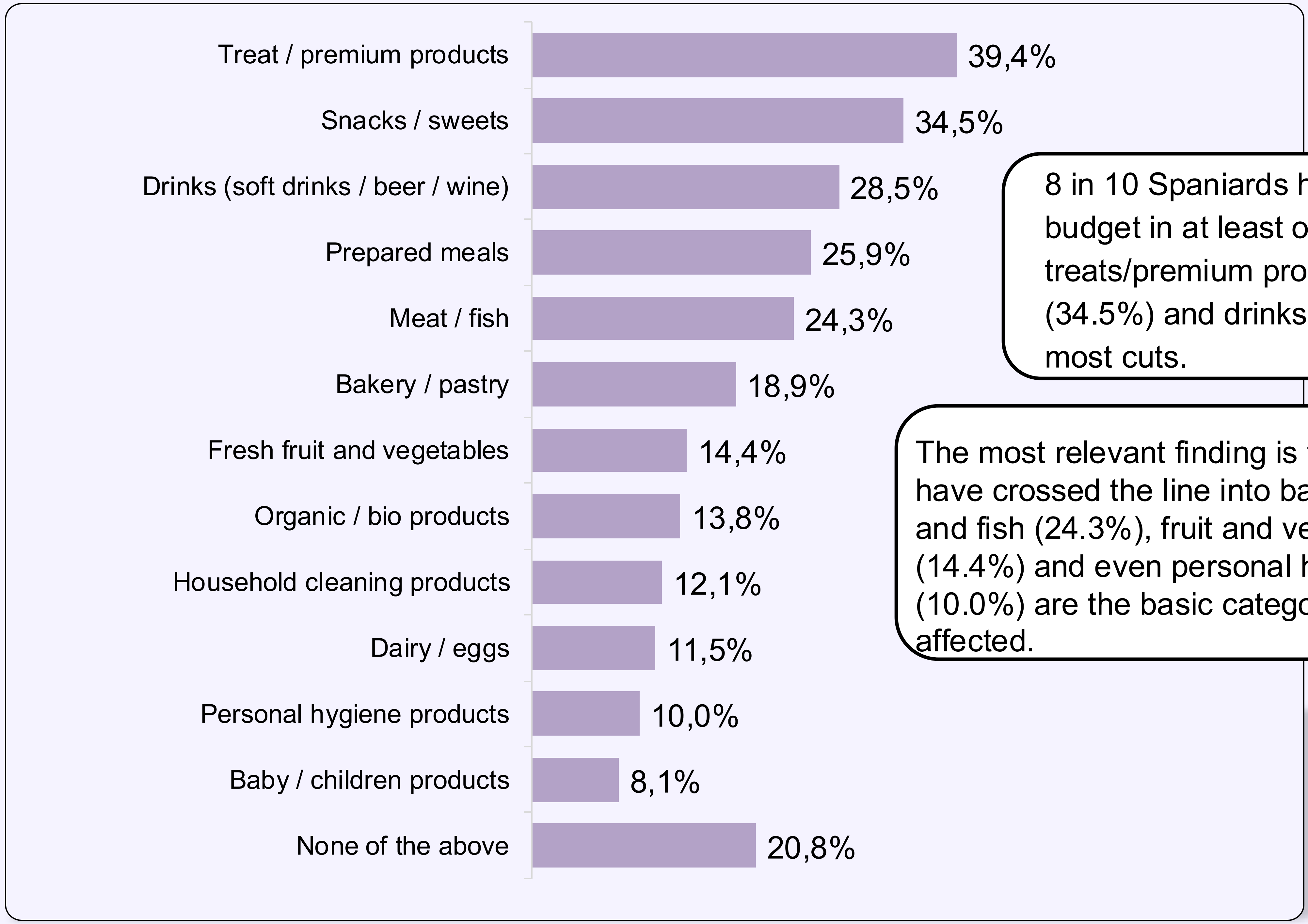
Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

PC5. What was the main reason?

Base Those who changed store in last 3 months: 270 interviews

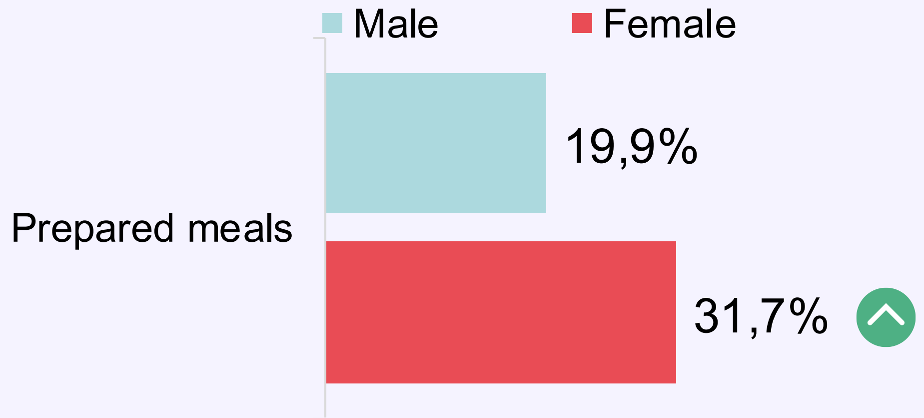
Categories Where We Cut Back Most



8 in 10 Spaniards have reduced their budget in at least one category, with treats/premium products (39.4%), snacks (34.5%) and drinks (28.5%) seeing the most cuts.

The most relevant finding is that these cuts have crossed the line into basics: meat and fish (24.3%), fruit and vegetables (14.4%) and even personal hygiene (10.0%) are the basic categories most affected.

Differences by Gender



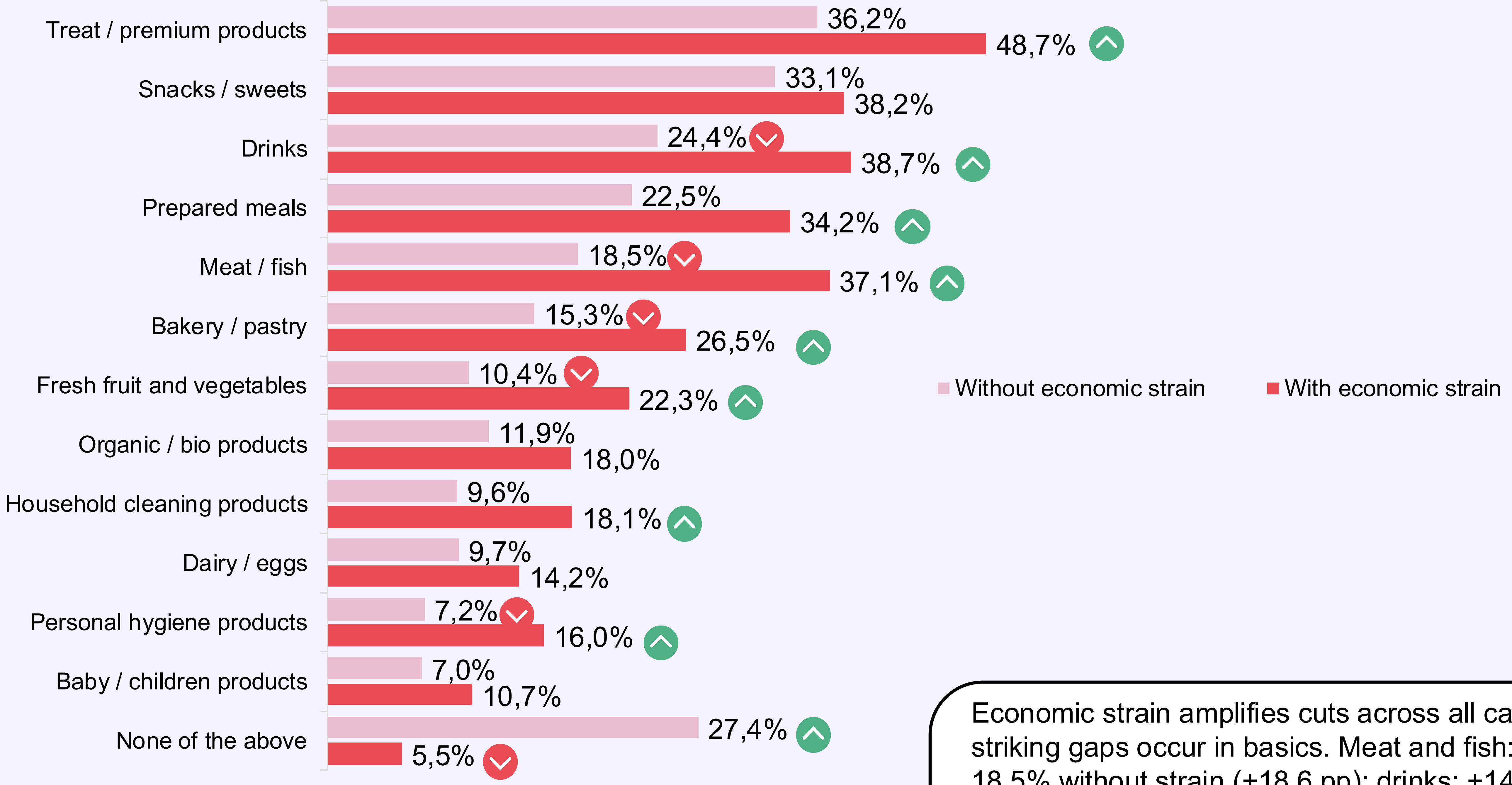
Women have generally cut back more across all categories; prepared meals are one example

Significantly higher differences are compared with the total sample
Significantly /lower differences are compared with the total sample

PD1. In the last 3 months, have you cut back in any of these categories?

Base: 1,000 interviews

Category Cuts by Economic Situation



Economic strain amplifies cuts across all categories, but the most striking gaps occur in basics. Meat and fish: 37.1% with strain vs. 18.5% without strain (+18.6 pp); drinks: +14.3 pp; fruit and vegetables: +11.9 pp. The most revealing item is that only 5.5% of households under strain have not cut back on anything, compared with 27.4% of those without strain. Cuts in personal hygiene reach 16% among consumers with difficulties, twice the level among those without strain (7.2%), signalling deprivation that goes beyond food

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

PD1. In the last 3 months, have you cut back in any of these categories?

Base: 1,000 interviews

"Without economic strain" (Comfortably or we make ends meet, but just about)

"With economic strain" (With difficulty or great difficulty)

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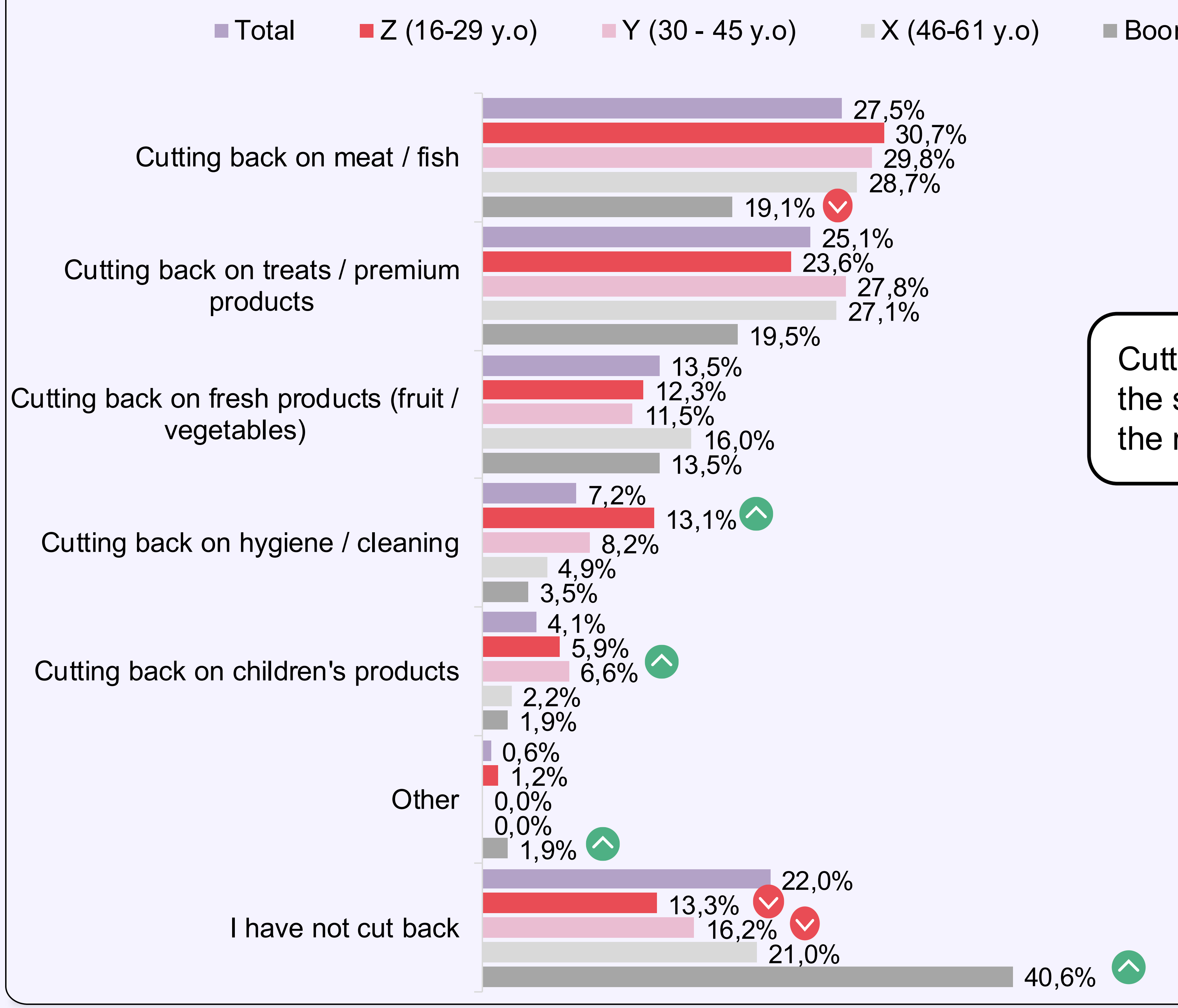
The Cut That Is Most Frustrating



Cutting back on meat and fish is the sacrifice that hurts Spaniards the most, regardless of generation

Young people (Generation Z) are the group that has had to cut back the most: 8 in 10 say so, compared with Boomers, who have had to do so least. Even so, 6 in 10 people over 62 have cut back in at least one category. Cuts in hygiene/cleaning generate discomfort especially among young people (13.1% among Gen Z), while Gen Y (30-45 years) shows the greatest discomfort regarding children's products.

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

PD2. Which cut affects you the MOST or annoys you the most?

Base: 1,000 interviews

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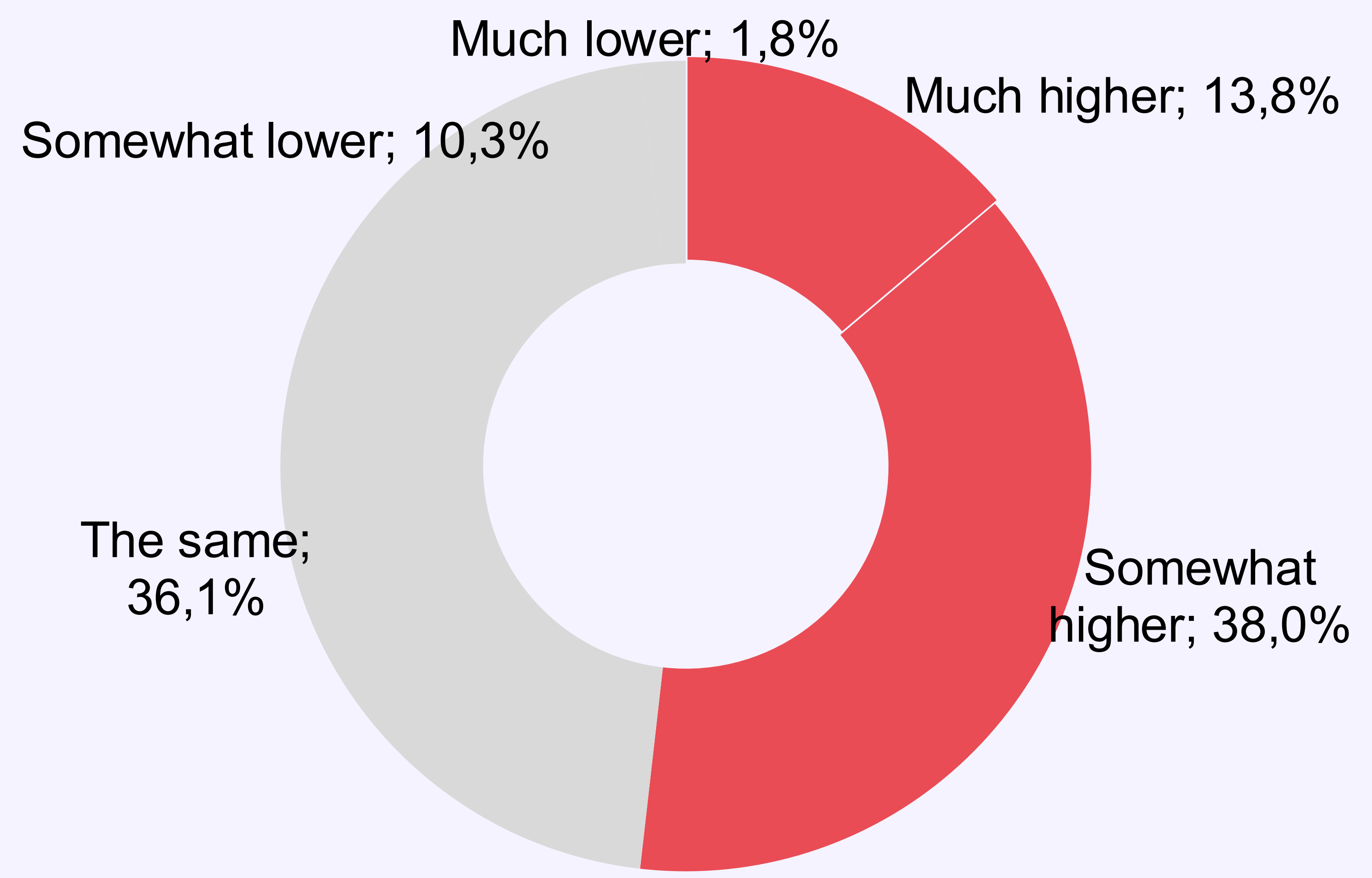
Monthly Shopping Spend

More than half of Spaniards say they now spend more on shopping than they did three months ago



52% SPEND MORE THAN 3 MONTHS AGO

PD3. Compared with 3 months ago, your monthly shopping spend is...

Base: 1,000 interviews

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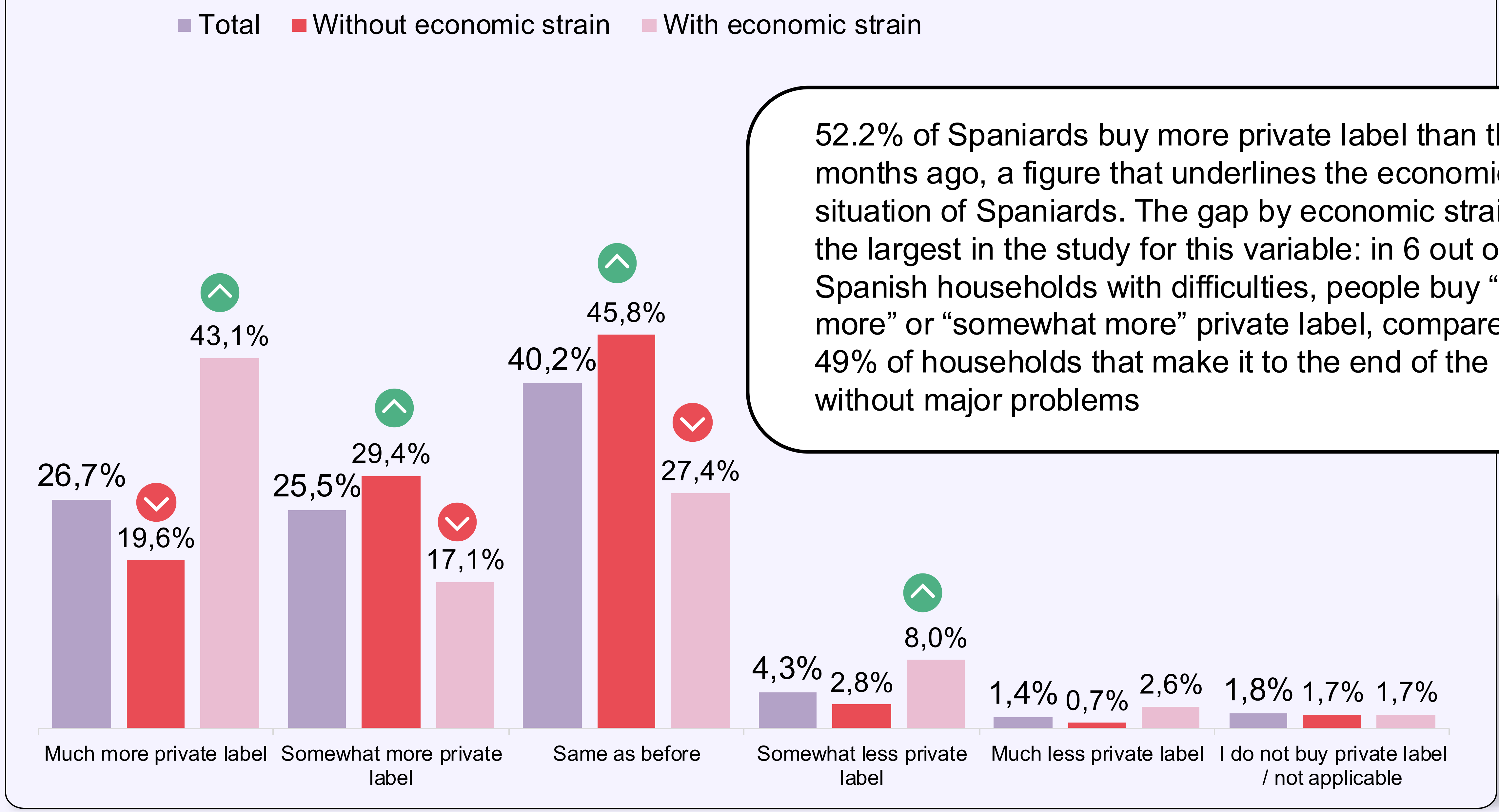
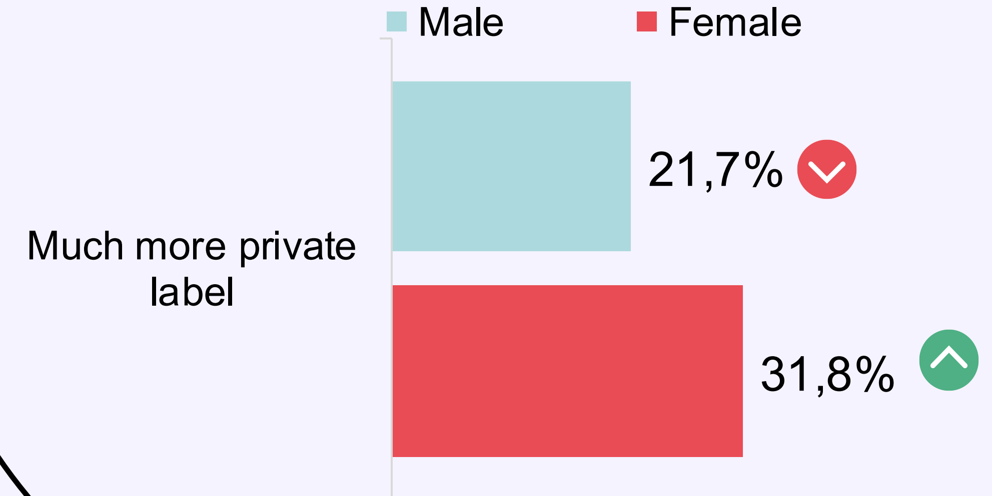
Private Label



52.2% of Spaniards buy more private label than three months ago, a figure that underlines the economic situation of Spaniards. The gap by economic strain is the largest in the study for this variable: in 6 out of 10 Spanish households with difficulties, people buy “much more” or “somewhat more” private label, compared with 49% of households that make it to the end of the month without major problems

Differences by gender



Women buy significantly more private label than men (31.8% vs. 21.7%).

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

“Without economic strain” (Comfortably or we make ends meet, but just about)

“With economic strain” (With difficulty or great difficulty)

Compared with 3 months ago, today you buy...

Base: 1,000 interviews

The growth in private label consumption is transversal across all generations, but Gen X leads this purchase behaviour (30.2% buy “much more”), followed by Gen Y (27.5%). Gen Z records the highest non-consumption rate for private label (4.8%), which may reflect non-independent households or greater consumption of convenience products without an established private-label reference

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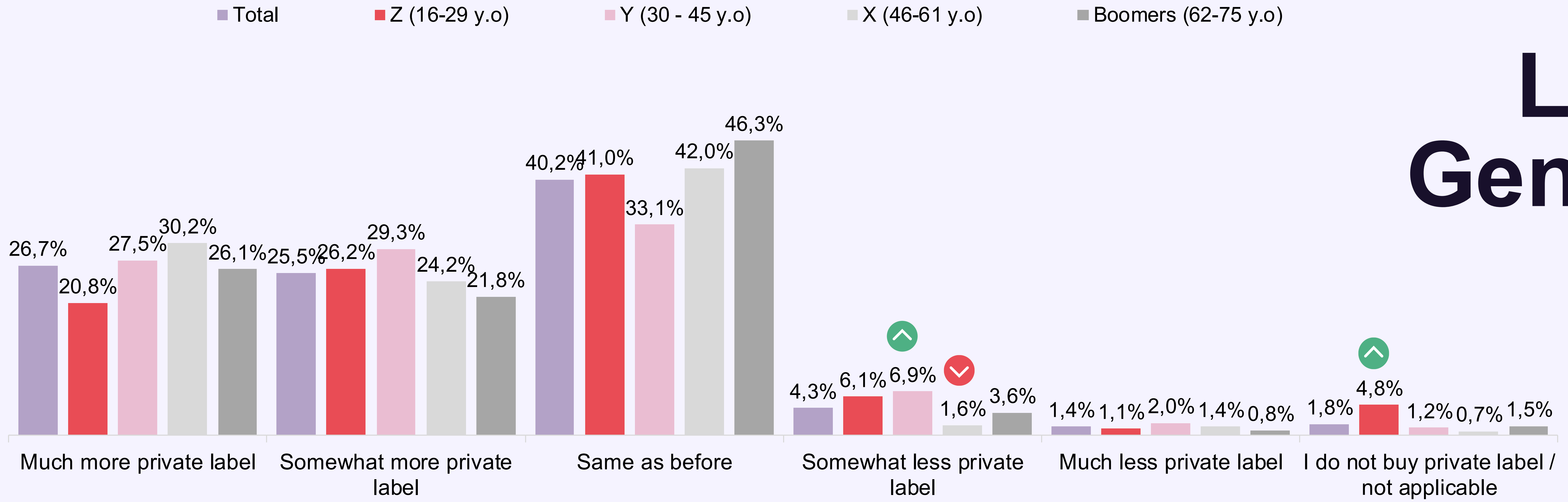
Private Label by Generation



Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

PD4. Compared with 3 months ago, today you buy...

Base: 1,000 interviews

Saving Strategies Adopted

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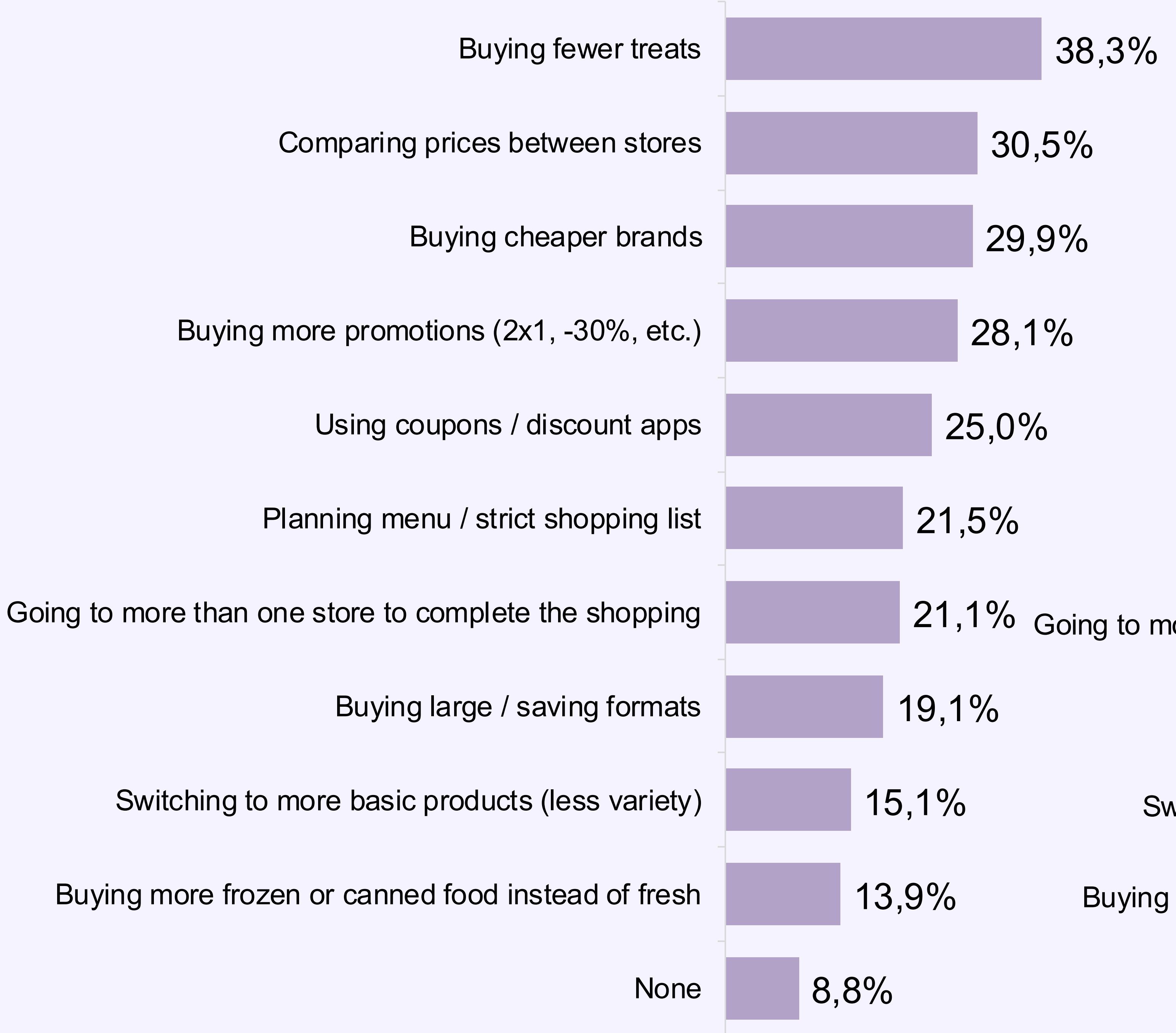

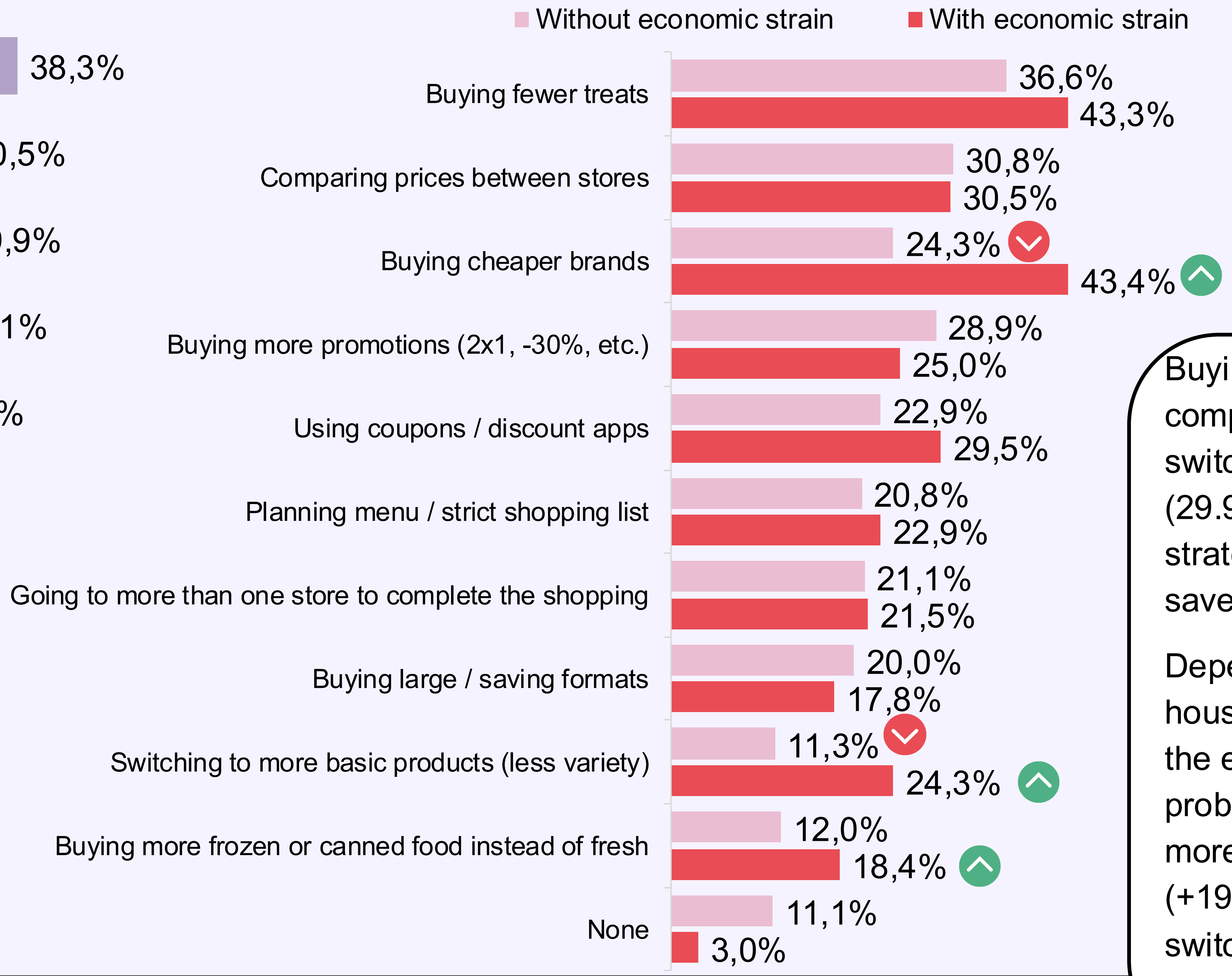

Buying fewer treats (38.3%), comparing prices (30.5%) and switching to cheaper brands (29.9%) are the most common strategies used by Spaniards to save on shopping.

Depending on whether the household has difficulty reaching the end of the month, those with problems finishing the month opt more for buying cheaper brands (+19 pp under strain) and switching to more basic products (+13 pp).

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

"Without economic strain" (Comfortably or we make ends meet, but just about)

"With economic strain" (With difficulty or great difficulty)

PD5. In the last 3 months, what strategies have you used to save on shopping?

Base: 1,000 interviews

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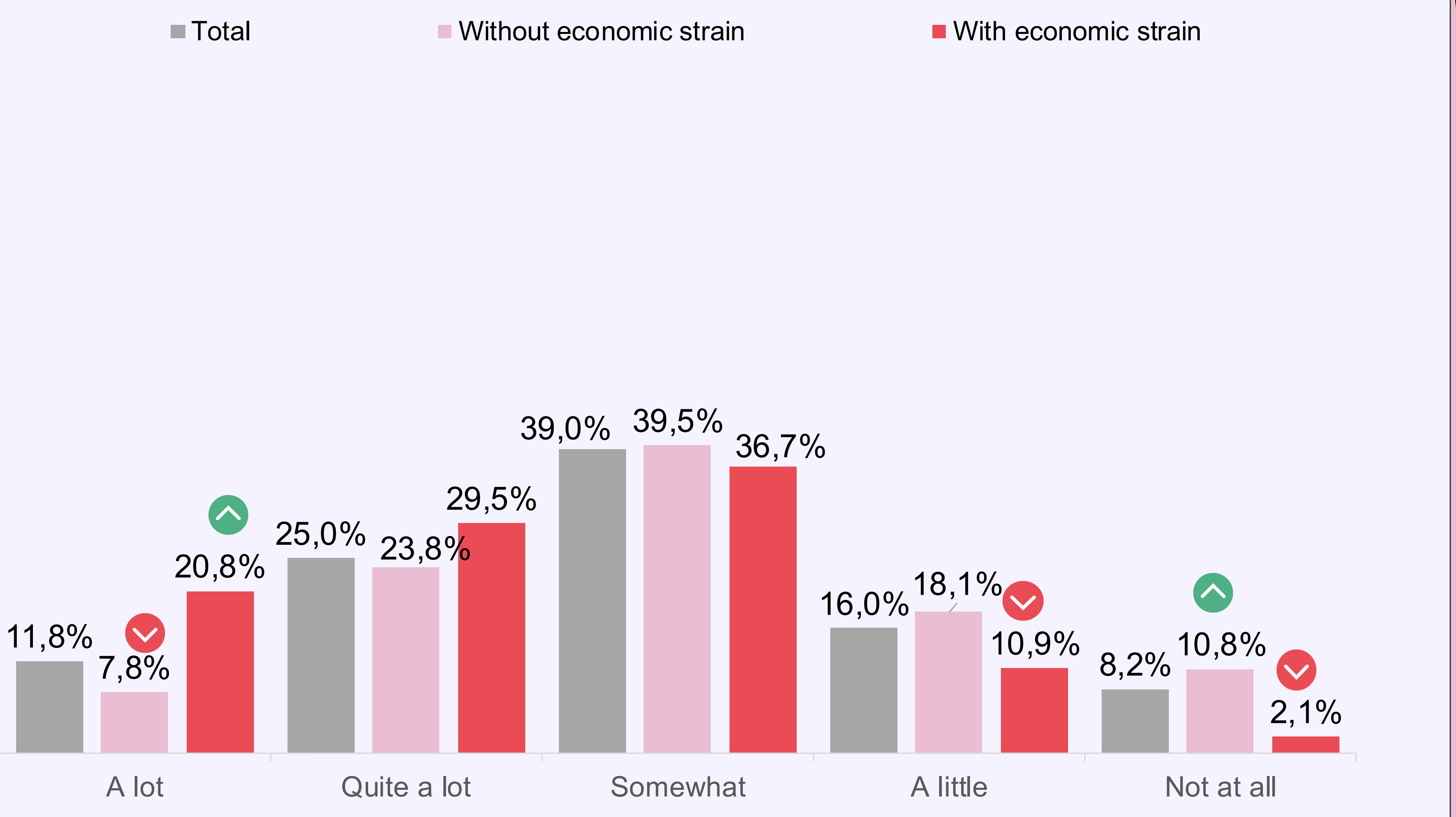
Change in Shopping Behaviour

37% of the total population has changed the way they shop in the last three months, rising to 50% among households that find it hard to make ends meet.



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Significantly /lower differences are compared with the total sample

"Without economic strain" (Comfortably or we make ends meet, but just about)

"With economic strain" (With difficulty or great difficulty)

PD6. How much would you say your way of shopping has changed in the last 3 months?

Base: 1,000 interviews

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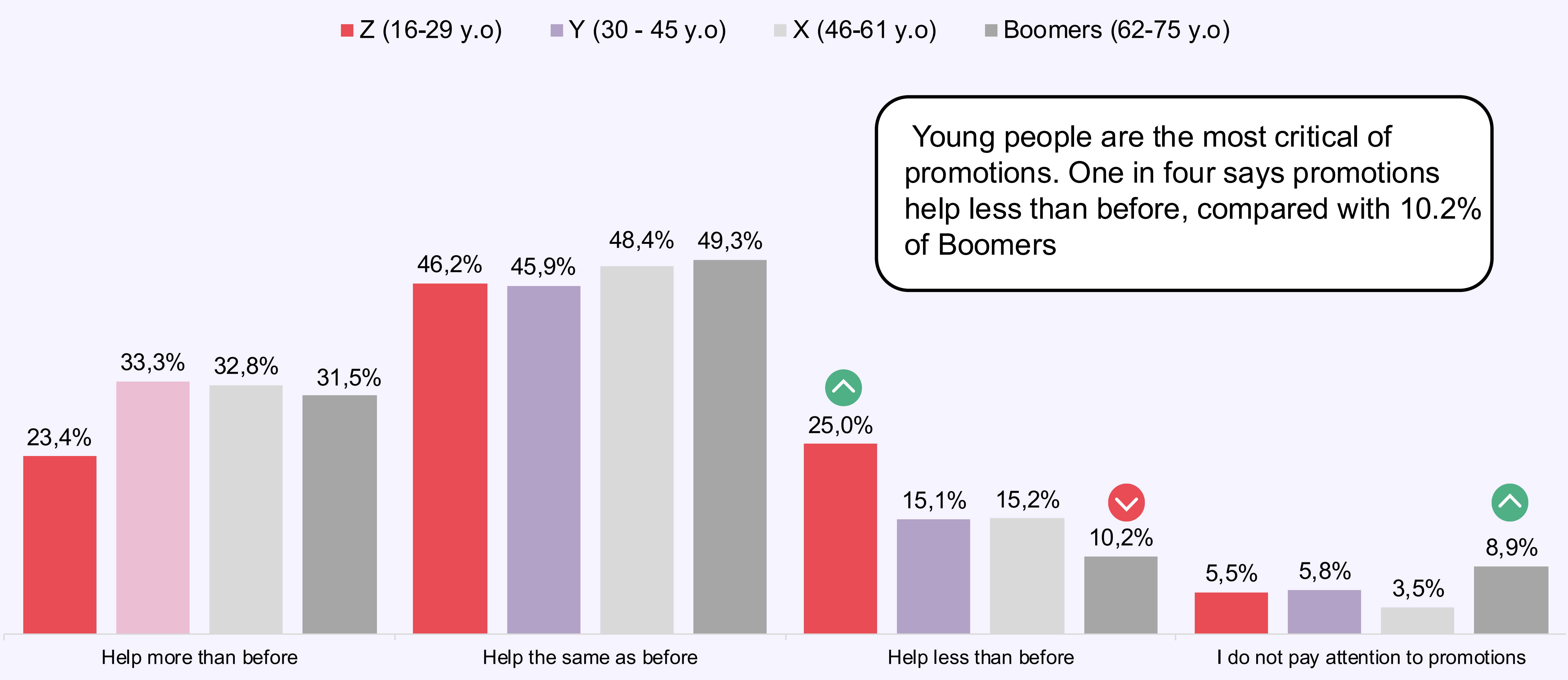
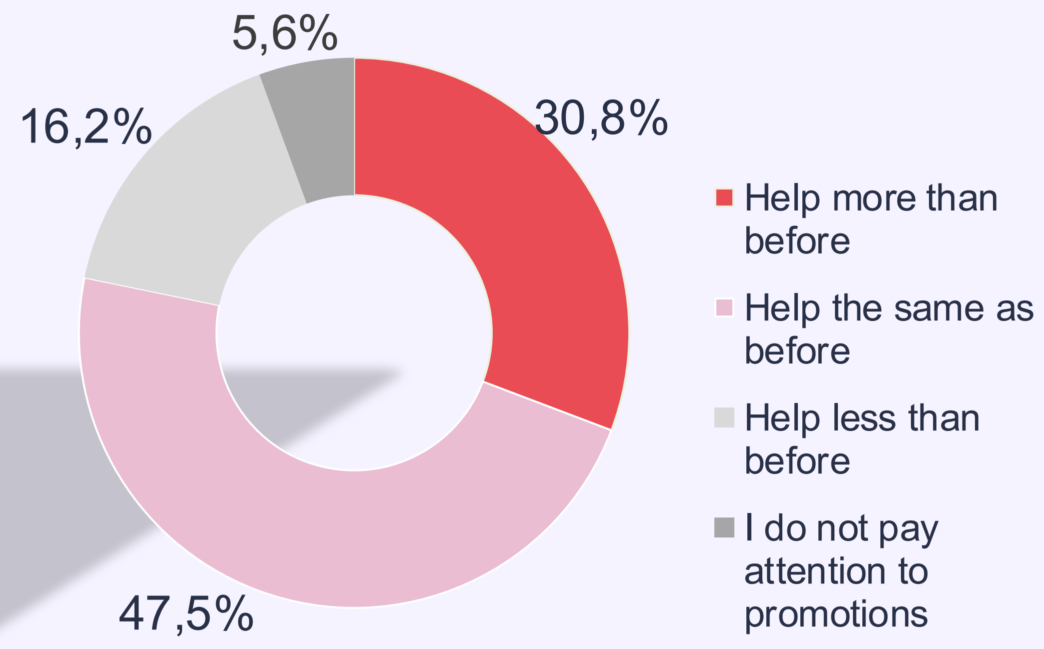
Do Promotions Help?



Young people are the most critical of promotions. One in four says promotions help less than before, compared with 10.2% of Boomers



Promotions continue to be valued positively. For 78% of Spaniards, promotions help them, either more than before or the same as before.

Significantly higher differences are compared with the total sample

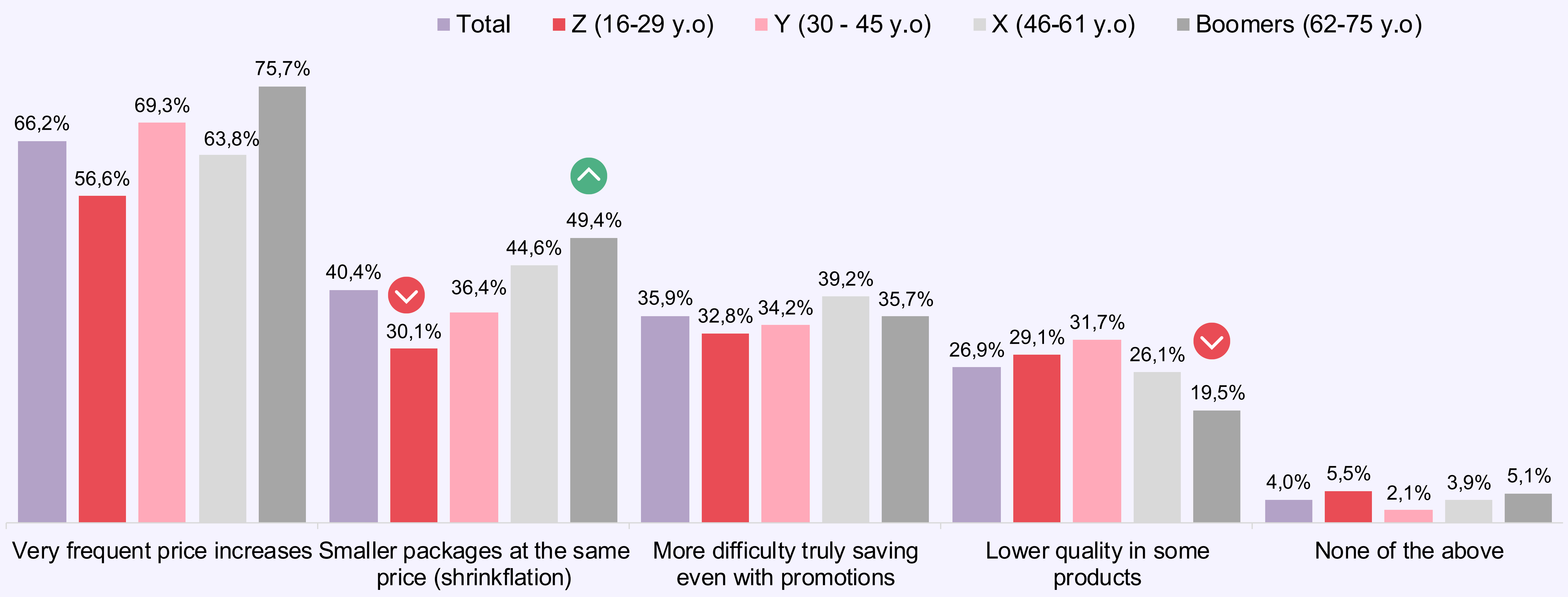
Significantly /lower differences are compared with the total sample

PE1. In general, today would you say promotions...

Base: 1,000 interviews

Price Increases and Smaller Packages

Two in three Spaniards have perceived price increases in the last year; 4 in 10 have noticed packages becoming smaller at the same price, known as shrinkflation; and more than 1 in 3 find it harder to truly save even with promotions



Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

Boomers are much more aware of price increases (75.7%) and shrinkflation (49.4%), while Gen Y perceives quality changes more often. Young people are least aware of shrinkflation

PE2. Have you noticed any of these situations in the last year?

Base: 1,000 interviews

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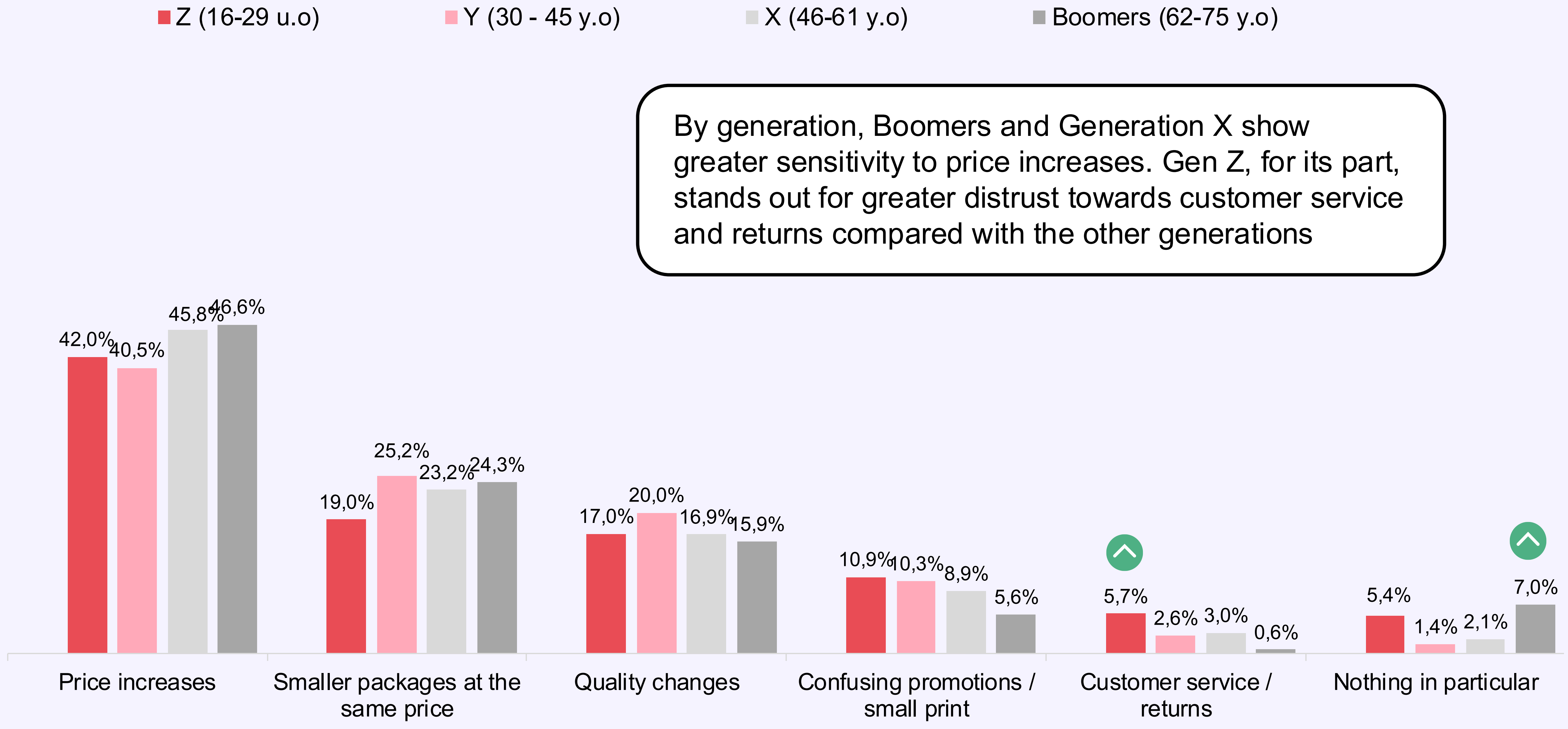
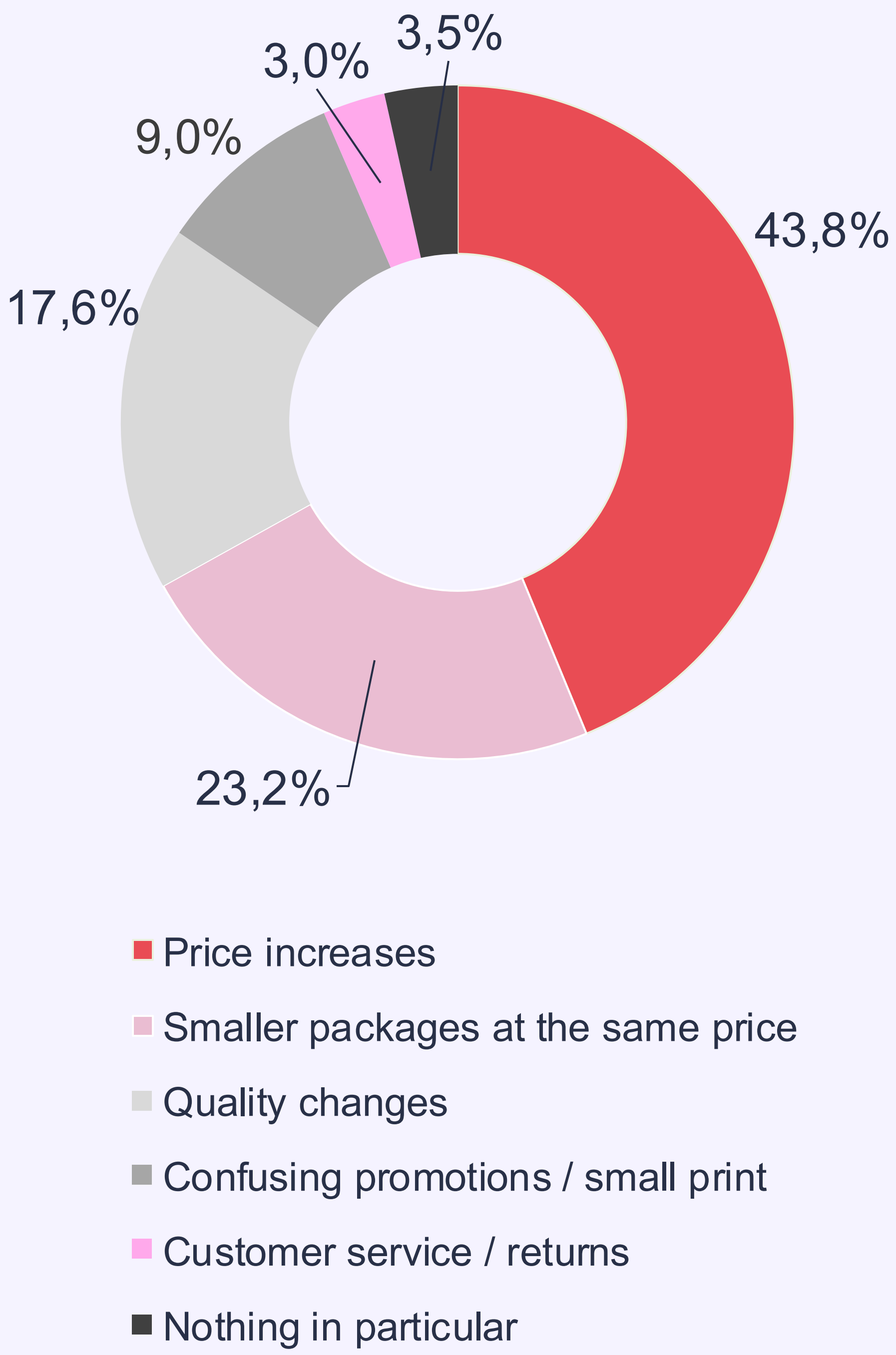
Distrust in...



By generation, Boomers and Generation X show greater sensitivity to price increases. Gen Z, for its part, stands out for greater distrust towards customer service and returns compared with the other generations



Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

For 44% of Spaniards, the issue that generates the most distrust when shopping is the constant increase in product prices

PE3. What generates the most distrust for you when shopping?

Base: 1,000 interviews

What Helps Saving

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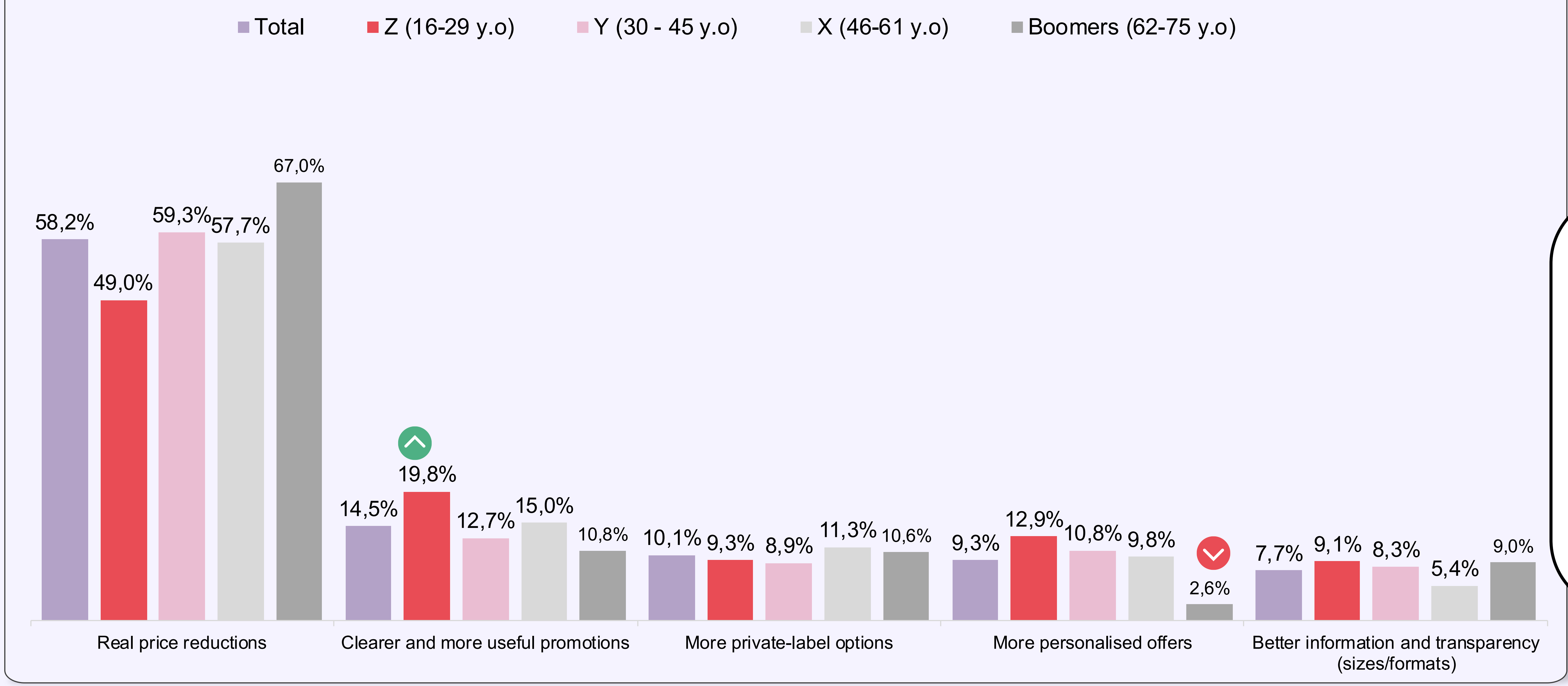

58.2% of respondents identify real price reductions as the priority measure, with demand increasing progressively with age (49% among Gen Z compared with 67% among Boomers). By contrast, the relevance of personalised offers decreases notably, from 12.9% among Gen Z to 2.6% among Boomers. Gen Z stands out from the other segments by pointing more often (19.8%) to clearer and more useful promotions as something that would help them save

Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

PE4. What would you consider fair to help you save?

Base: 1,000 interviews

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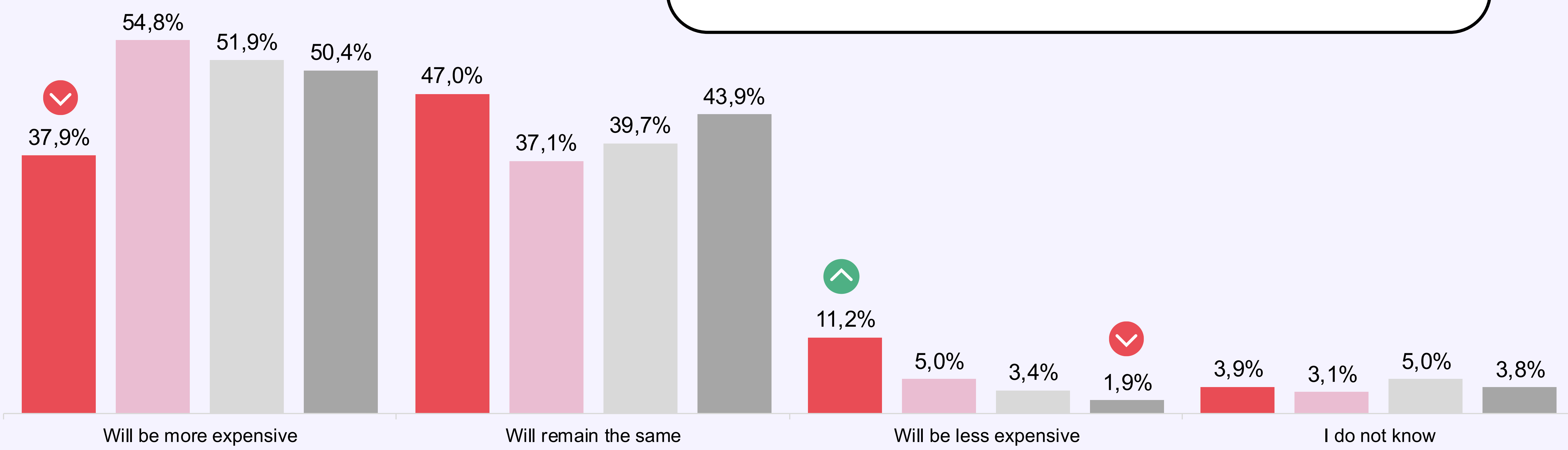
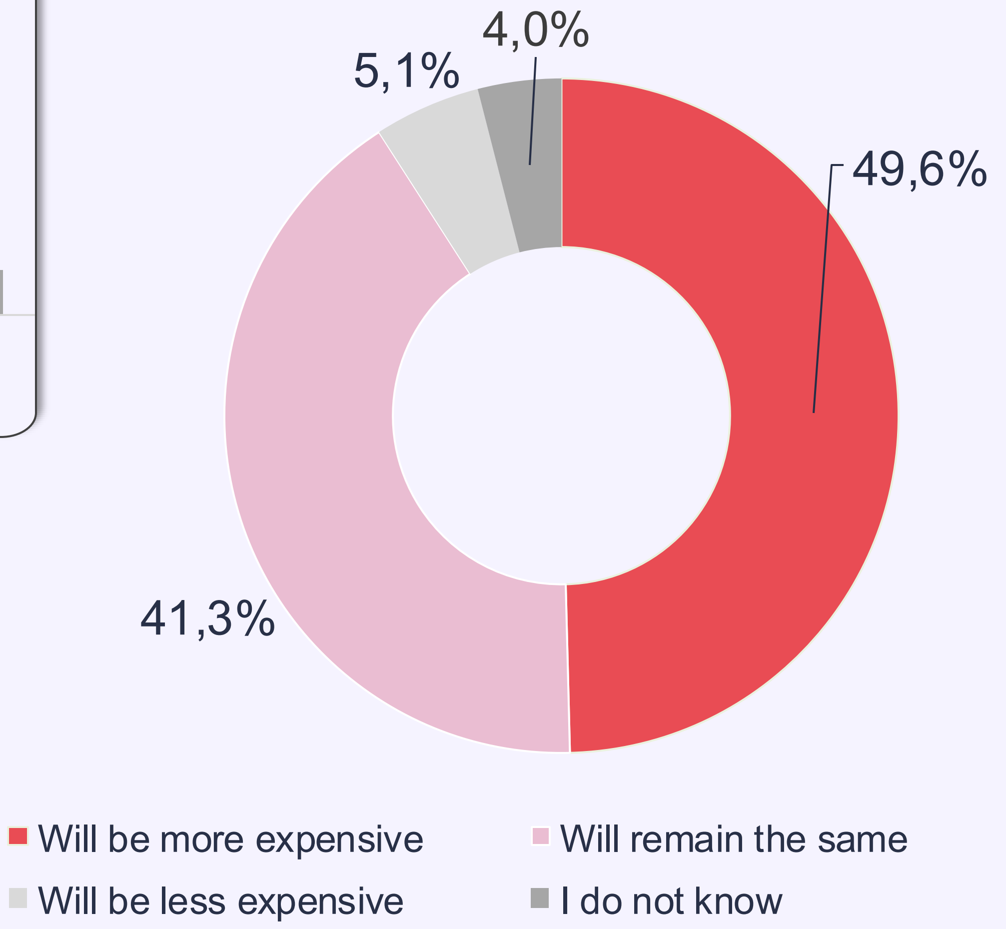
The Price of the Shopping Basket in 3 Months Will Be...



Pessimism prevails among Spaniards. Half expect their shopping to be more expensive in the next three months. Gen Z is the most optimistic: only 37.9% expect prices to rise, and it is the only group with a relevant percentage expecting prices to fall (11.2%), six times higher than Boomers (1.9%).



Significantly higher differences are compared with the total sample

Significantly /lower differences are compared with the total sample

PE5. In the next 3 months, do you think your household shopping...

Base: 1,000 interviews

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Conclusions

Conclusions

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Spaniards pay more to fill a smaller basket: cuts now reach the basics

The most structural finding of the study is the central paradox: more than half of Spaniards spend more on shopping than they did three months ago (52%), but this does not translate into greater well-being; rather, it translates into cuts and impoverishment of consumption. The adjustment is no longer limited to treats: it has crossed a critical line towards basics such as meat, fish and even fruit and vegetables. This indicates a real loss of purchasing power, not just a perception

Spain enters the economy of "just getting by": supermarket shopping drives household stress

Most households say they make it to the end of the month, but in a fragile balance ("just about"), while nearly 3 in 10 do so with difficulty. In addition, shopping prices generate an average stress level of 7.1 out of 10, turning food shopping into one of the main sources of daily anxiety. This is not a one-off crisis: it is a chronic adjustment, where consumers continue to function, but under constant strain.

Price rules: consumers abandon brands and habits to survive the shopping basket

More than half of Spaniards (52.3%) buy more private label than three months ago, a massive shift away from well-known brands that affects all economic profiles. The largest gap in the study appears here: 43.1% of households with economic difficulties buy "much more" private label, compared with 19.6% of those without strain. But the relevant point is that even the latter group is adopting it, indicating that private label has stopped being an emergency resource and has become a normalised choice.

Distrust settles into the supermarket: consumers assume everything will keep going up

Almost half of Spaniards believe shopping will be more expensive in the coming months, reflecting a climate of persistent negative expectations. This is compounded by a widespread perception of constant price increases, reduced product sizes (shrinkflation) and the growing difficulty of saving even with promotions. Consumers are not only adjusting; they are losing trust in the pricing system

Infographic

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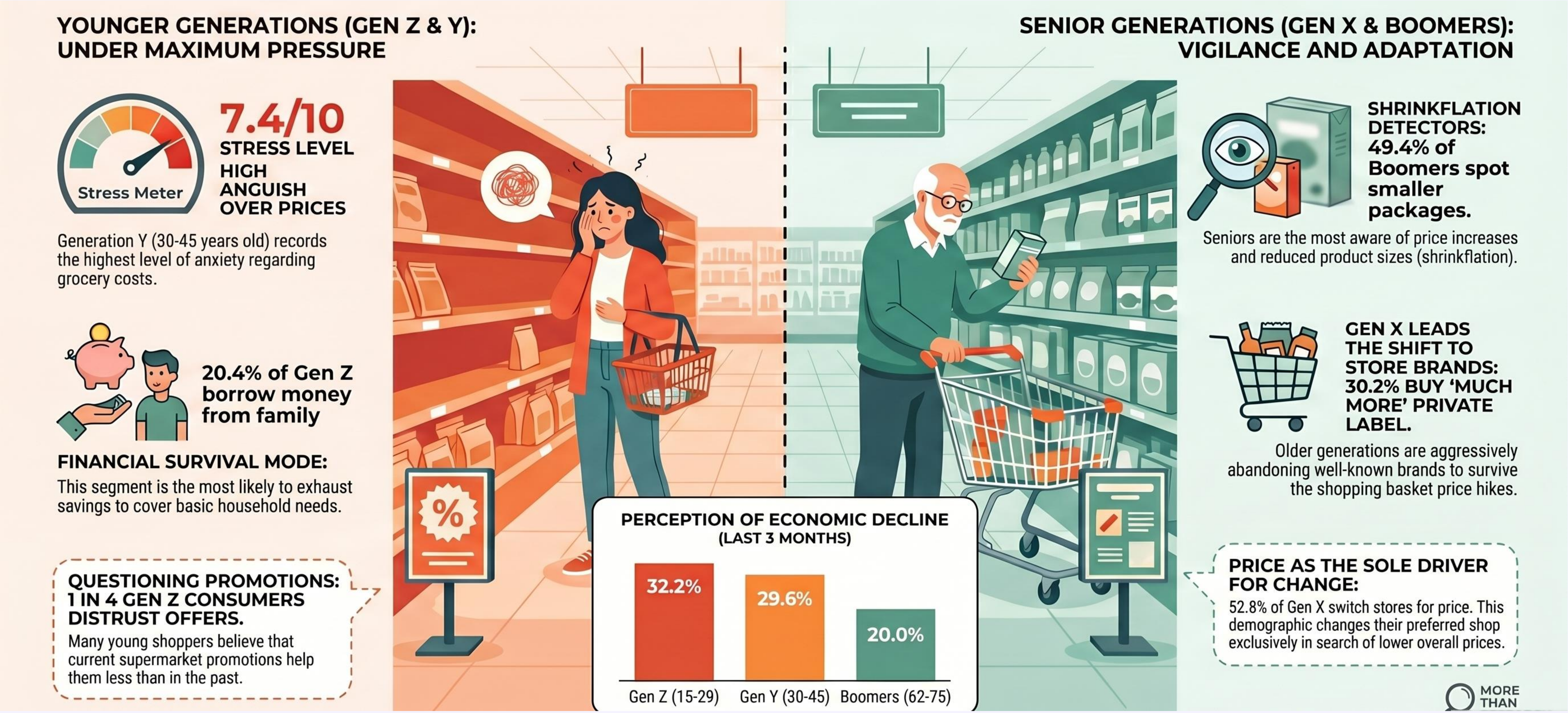

Thank you

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