

2025 GLOBAL

V O I C E S



esw.



ABOUT
THIS

SURVEY

“Every success story is a tale of constant adaptation, revision, and change.”

— Richard Branson, Founder of Virgin Group

Ecommerce is in a constant state of change because customers and their expectations are constantly evolving. Each new innovation – from AI to social media, faster shipping times, and new payment methods – raises the bar for brands and retailers to deliver exceptional experiences.

We conduct our annual Global Voices survey to discover and quantify what consumers want from their ecommerce experiences. We asked shoppers from six continents how they feel about a variety of ecommerce and cross-border related topics: anticipated spending habits, how long they're willing to wait for an order, how they prefer to pay at checkout, and much more. In this report, we provide the responses and analy-

sis you need to grow your brand's presence worldwide, win new customers, increase loyalty and achieve long-term revenue and profitability.

Survey methodology

Responses were gathered from an online panel of adults 18+, representative of national quotas for key demographics in 18 countries. Survey questions and responses were translated into each country's native language, and currencies were converted to local currencies before being converted back to \$US for comparison purposes. A total of 18,448 surveys were completed between October 20 and November 1, 2024.

“Clients come to us and stay with us because they trust we know how to grow their international business and distribute risk.”

– Martin Tully, Chief Client Officer, ESW

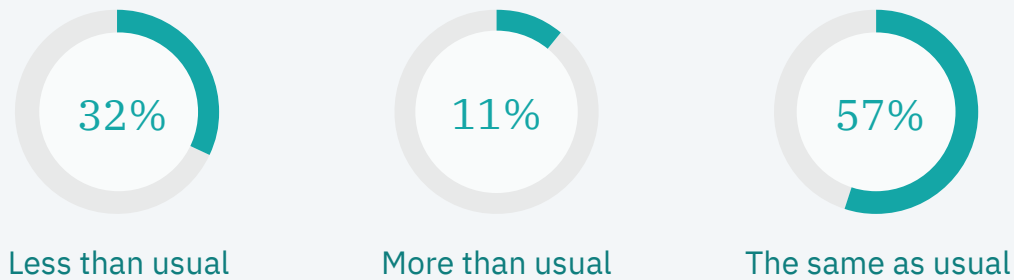
THE 30,000-FOOT VIEW

While global markets are rarely on a steady growth track, recent and current events like ongoing global conflict in Europe and the Middle East, cost of living crises and governmental policy changes have made the future even more uncertain. Our survey revealed that consumers are more concerned about their personal finances than they were a year ago, and

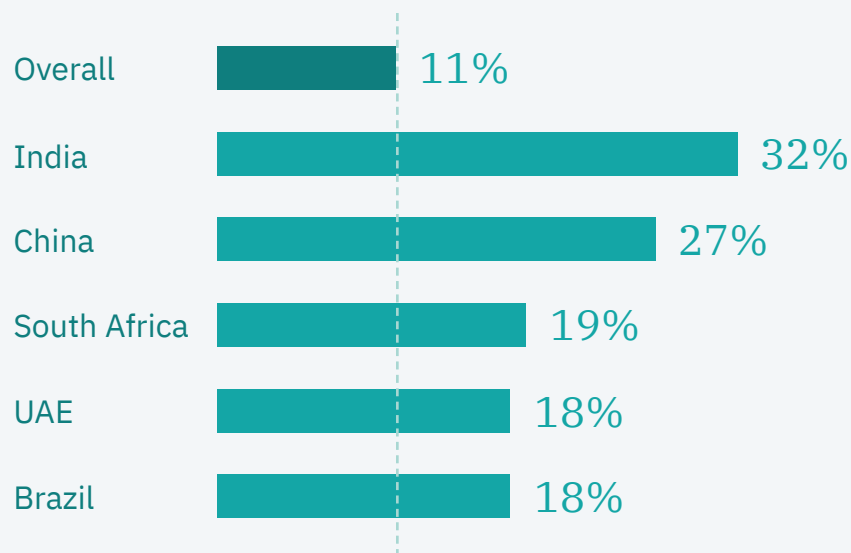


About 4 in 10 shoppers in France, Mexico and Argentina plan to spend less than usual.

Consider the next 12 months and your online spending intent.
Do you plan to spend...



Countries with shoppers who intend to spend more online this year



as a result, they plan to reduce their online spending. In last year's survey, approximately 25% of respondents reported that they planned to spend less online than usual in the following months. This year, that figure was up to 32%. Overall, only 11% of respondents said they plan to spend more than usual online. However, consumers in the growing markets of India, China, South Africa, the UAE and Brazil all reported

plans to spend more than last year. Globally speaking, spending enthusiasm appeared to cool, but shoppers in some markets reported a different attitude toward spending. This is where diversification is key. If all your proverbial eggs are in one market's basket, your success or failure is subject to the whims of a relatively small group of consumers. By expanding into new markets, you distribute risk and reap revenue rewards.

SAVING MONEY

IS THE
PRIORITY FOR
SHOPPERS
OF ALL
AGES



The number one reason consumers gave for reducing online spending was their desire to save money. This was true for respondents of all ages. The second most-cited reason for older consumers was concern about the current economic climate. However, the high cost of essential goods was the second-most-cited reason for Gen Z to reduce spending.

Luxury shoppers are most likely to increase online spending this year.

Only around 15% of shoppers who bought accessories, clothing, consumer electronics and beauty products plan to spend more online in 2025. But 23% of luxury shoppers said they'll increase their online purchasing.

Top two reasons shoppers are spending less online:

Baby Boomers



Gen X



Millennials



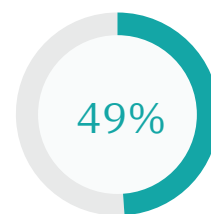
Gen Z



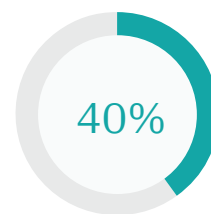
Shoppers who plan to spend more online this year are looking for variety and low prices.

Worldwide, shoppers who plan to increase online spending said that additional purchase options and better pricing are the main reasons they'll open their wallets. Around 30% thought the economy is improving and 28% said they have more disposable income.

Top two reasons for spending more online this year



There are more purchase options online



Shopping online is less expensive than shopping in-store



51% of shoppers in Brazil will spend more online because they perceive online shopping as less expensive than in-store shopping.



ALL THE WORLD'S A MARKET

Ecommerce has all but eliminated borders – at least in the minds of shoppers. [More than 4 in 10 respondents placed up to 10 cross-border orders.](#) Another 37% placed between 11 and 50 orders from other countries. Not only is ecommerce a growing channel, but international ecommerce is now the norm. All of that is good news and can make go-

ing global seem like a very easy decision to make. But many of ESW's clients came to us because they tried to expand internationally on their own but quickly realized how complex it was. From customs to taxes to fraud prevention and complying with privacy requirements, opening an ecommerce channel in a new market requires expertise and a network of vetted providers.

Price and availability prompt cross-border shopping

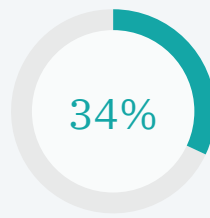
Why do shoppers look across borders to place online orders? Respondents consistently ranked price, including taxes and shipping, and product availability as the top reasons they look overseas to make a purchase. But buying cross-border is not always a shopper's first impulse, and there are reasons consumers more often buy domestically. When asked why they don't buy from another country, the top two reasons given were high shipping costs and long shipping times.

To reach international shoppers, you'll need to deliver orders quickly and at reasonable prices. A great way to achieve that is to have in-country and in-region fulfilment.

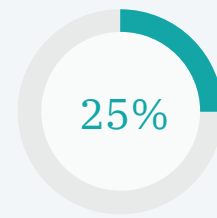
Destination shopping

Shoppers will buy cross-border from just about anywhere, but certain countries are more highly shopped than others.

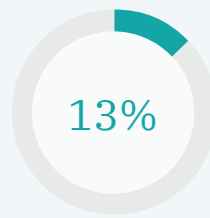
The top international shopping markets are:



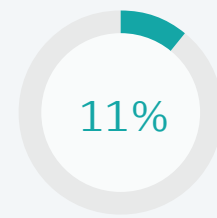
China



The United States



The United Kingdom
and Japan



Germany

“With ESW’s support, we’ve streamlined our import processes and enhanced our online shopping experience, ESW [is] a key part of our success in reaching more customers around the world.”

– Raffaele Nardo, Chief Digital Officer, DSQUARED2

DSQUARED2

DSQUARED2 successfully expanded into 76 new markets, achieving a double-digit growth in gross merchandise value (GMV) with the help of our expertise and solutions.

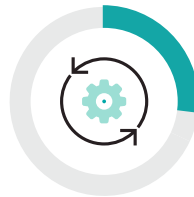
Brands in these markets evoke different feelings and associations among shoppers. Consumers associate quality, value, durability, classic, and authenticity with brands from the US, the UK, and Germany. Brands from China are associated with value, function and trendiness.



China



Value
48%



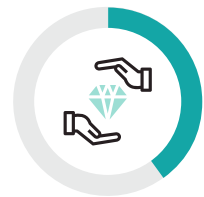
Functionality
27%



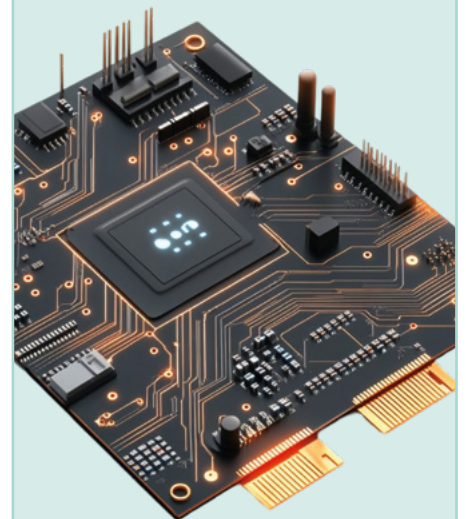
The United States



Quality
48%



Value
39%





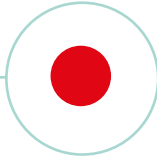
The United Kingdom



Quality
48%



Value
39%



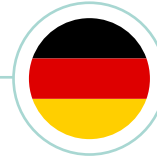
Japan



Quality
45%



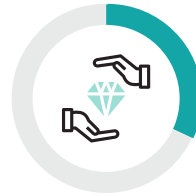
Value
33%



Germany



Quality
53%



Value
33%



OUT FOR DELIVERY

A woman with long dark hair, wearing white headphones and a white t-shirt, is shown in profile, looking upwards and to the right. She is carefully placing a cardboard box on top of a stack of other boxes. The background is a bright, out-of-focus office or warehouse setting with large windows.

RETURN TO SENDER

Logistics are a key piece of the international ecommerce puzzle. Consumers will buy from international brands, but they expect the shopping, delivery and return experience to be similar or the same as if they were buying from a domestic retailer. That can be a challenge for global and enterprise brands because warehousing,

freight, customs clearance and last-mile delivery all must work together to create the seamless experience customers expect. One of the greatest hurdles is meeting customer expectations around delivery times. Ever since Amazon set – and continues to reduce – the standard for shipping times, brands have struggled to keep up. What's more, free shipping and free returns seem to

be the industry table stakes, but those costs must be offset somewhere without driving up prices beyond what the customers can afford. Overall, survey respondents are willing to wait up to a week to receive their purchase in exchange for free shipping. While this is far longer than two-day Amazon shipping, it is still a very short time to ship items into another country, clear customs and deliver the package. What's more, those expectations vary by country. For example, 23% of shoppers in Italy expect packages in three days or less but 13% of shoppers in Brazil, Australia and Argentina will wait two weeks or more.

To meet shopper expectations, you'll need to first of all understand what those expectations are and then position inventory to meet these expectations.

Paying for returns

Then, there is the issue of returns or reverse logistics. Shipping and processing returns is costly – both in time and money. Yet, a positive return experience can

actually build customer loyalty if the process is fast and easy for the shoppers. Much like shipping times, respondents have differing views on paying for returns

depending on where they live. In general, around half of shoppers will make a purchase if there is a nominal fee to return it. Shoppers in India are more willing to accept a return fee, while shoppers in Spain are the least likely to do so. Again, knowing the market and setting policies accordingly is key for international ecommerce success.

Leveraging creative solutions

To reduce both outbound and return shipping times and costs, consider deploying an omnichannel strategy that offers options for placing orders online and picking up from a store or designated pick-

up point. Return-to-store options allow customers to make returns in-store, thereby reducing shipping costs.

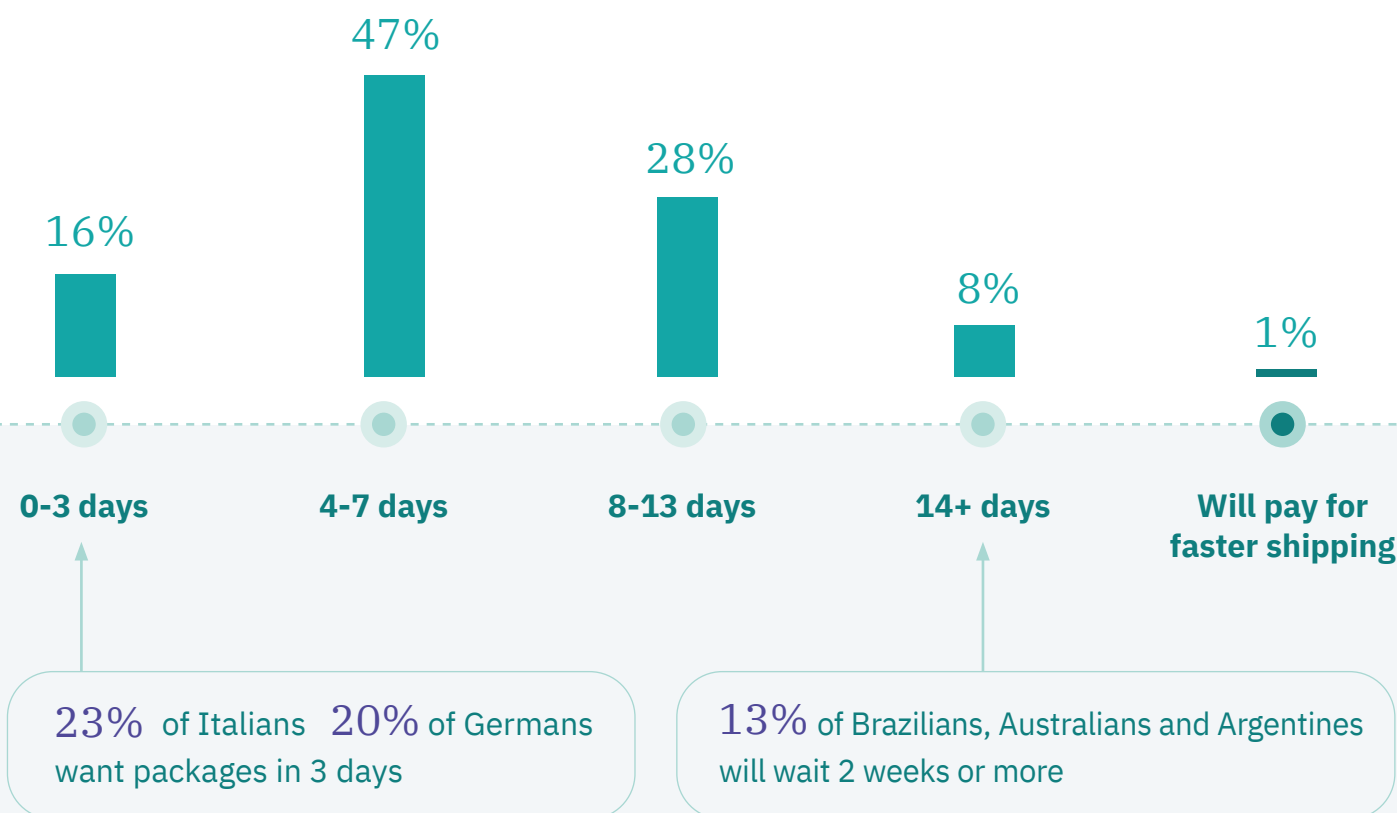


“We’re constantly deploying solutions that give our clients and their shoppers flexibility and reduce costs. Optimising inventory positioning to best meet the shoppers’ needs as well as the client’s needs is our priority.”

– **Frank Kouretas,**
Chief Product Officer, ESW

DELIVERING ON CUSTOMER EXPECTATIONS

How long are you willing to wait for non-urgent purchases in exchange for free shipping?



PAYING FOR RETURNS

Markets most willing
to pay for returns

India 79%

China 71%

UAE 71%

Switzerland 63%

Markets least likely to place
an order if there's a charge
for returns

33% Argentina

32% Brazil

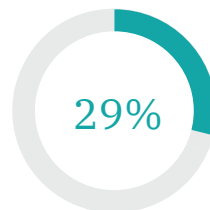
31% Mexico

24% Spain

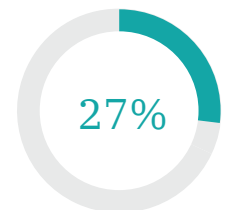


TYPES OF RETURN FEES AND WHO WILL PAY THEM

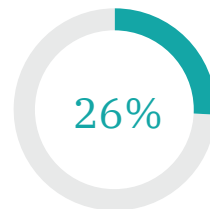
What kind of return fee are you inclined to pay?



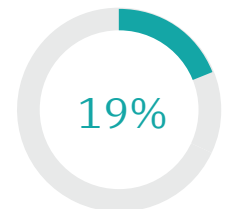
A membership
fee that includes
free returns



Return
shipping fee



Subscription
that includes
free returns



A flat fee per
item returned or
restocking fee

Shoppers in Spain and Mexico prefer paying for a **subscription service** that includes free returns

4 in 10 shoppers in Germany and Switzerland prefer a **return shipping fee**

4 in 10 shoppers in Australia and Brazil would be comfortable paying a **membership fee**

SECOND -HAND

IS
BECOMING
FIRST-RATE



Selling pre-owned goods online is hardly a novel concept. In 1995, eBay launched as an auction site that enabled private individuals to sell used goods, primarily collectibles. Before ecommerce, charity and used goods shops took in donations of clothing, knickknacks, home goods and other items people no longer wanted and sold them at low prices. The recommerce industry has evolved significantly in the last 30 years. Shoppers looking for collectibles can still connect with fellow enthusiasts and buy rare items. But now, eco-conscious shoppers can snag brand-name used clothes from sites like Thredup. Luxury shoppers can buy authenticated fashion and accessories at reduced prices. Consumers can save money by purchasing refurbished electronics. Not only does recommerce benefit consumers by providing access to collectible, one-of-a-kind, or less expensive goods, but it also presents an opportunity for brands. Brands that embrace recommerce can re-sell returned goods and protect their brand's reputation.

Almost 40% of shoppers worldwide reported purchasing a used or refurbished item online in 2024.

Of those who participated in recommerce, half said they bought clothing or accessories and electronics. Even more encouraging for brands looking to open a recommerce channel, 90% of those who bought used or refurbished goods said they'd do so again.





RECOMMENCE BY THE NUMBERS

Nearly **4 in 10** global shoppers purchased a **used or refurbished item** online last year

Of those who bought used or refurbished items, **90% would do so again.**

What they purchased?



51%
Electronics



51%
Clothing or accessories



22%
Jewellery



21%
Luxury items

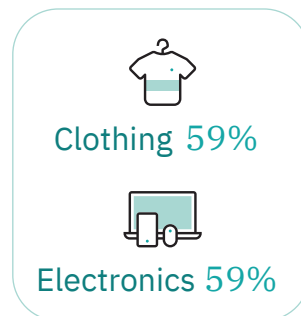
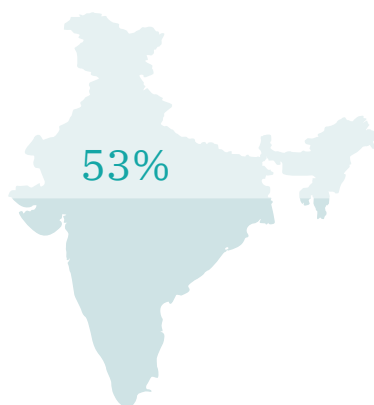


8%
Other

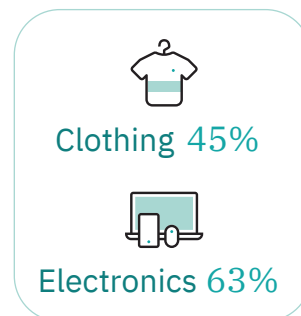
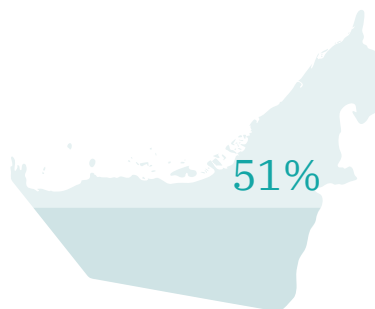
Respondents could select all that applied.

Top 3 countries buying used or refurbished and what do shoppers buy?

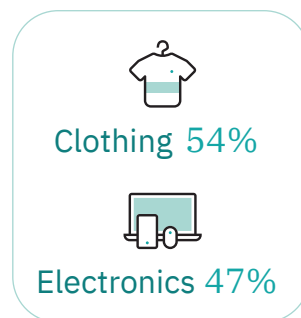
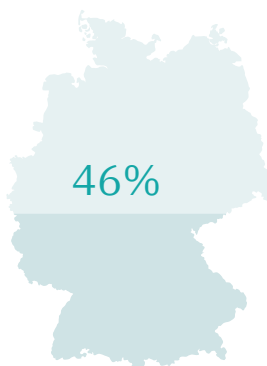
India



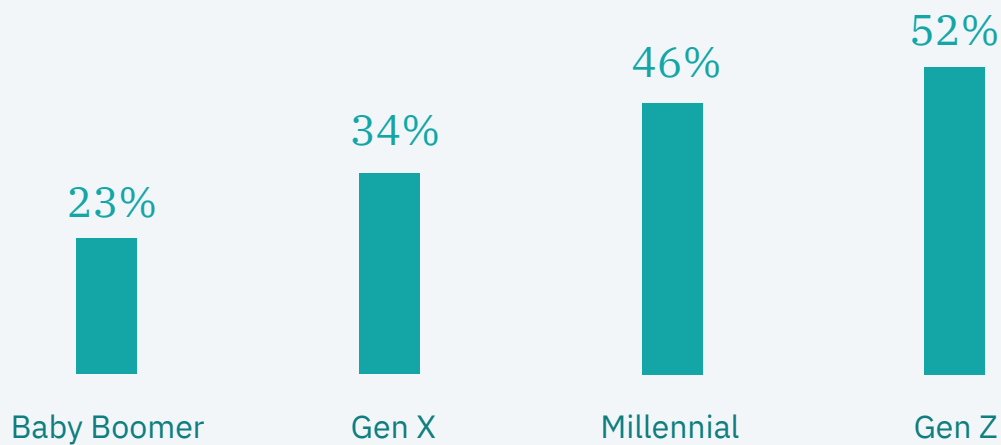
UAE



Germany



Recommerce shoppers by generation



Why buy used?



24% of shoppers did not buy used goods because they were concerned about the quality of a used or refurbished item.

A close-up photograph of a person's hands. The person is wearing a light blue, textured knit sweater. They are holding a black, textured wallet in their left hand and a colorful, iridescent card in their right hand. The card has a rainbow-like gradient. The background is blurred, showing more of the sweater and a hint of a white surface.

ENTER PAYMENT DETAILS

You're not in business if customers can't pay for their orders. If you've been in the ecommerce game for a while, payments may seem pretty straightforward. And they probably are for your domestic market. However, expanding internationally requires a customer-centric approach, which involves understanding the preferred payment methods in each market and having the necessary systems in place to process and secure those payments. In general, survey respondents reported that credit and debit cards were the most common methods used for paying for online orders. But the use of other methods like buy now, pay later (BNPL) and cash varied greatly depending on the country. When expanding into new markets, it's im-

portant to offer the right payment methods for that market but not overwhelm shoppers at checkout by listing payment methods that are not available or that they'd never use.

Secure payments for higher conversions

Cart abandonment can be high no matter the market, but if shoppers are concerned that their information is not secure, they leave their carts without making the purchase. Six in 10 survey respondents in India said they had abandoned their carts due to security concerns. With all the investment in international expansion, don't lose the sale in the final step by neglecting security.

WAYS THEY PAY AND CART ABANDONMENT



Which payment methods have you used to make online purchases (select all that apply)

52%



Credit card

45%



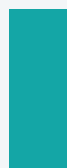
Debit card

41%



Digital Wallet
(Google Pay, Apple Pay,
WhatsApp, PayPal)

25%



Cash

13%



BNPL

4%



Crypto



20% of shoppers in Asia-Pacific countries used BNPL compared to 4% in Latin American countries.

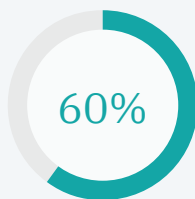


4 in 10 shoppers in the Asia-Pacific and European regions used digital wallets last year compared with only 3 in 10 shoppers in North America and Latin America.



42% of global shoppers have abandoned their carts due to payment security concerns.

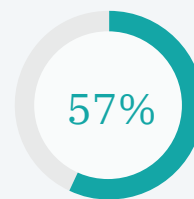
Countries with the highest cart abandonment rates due to payment security concerns



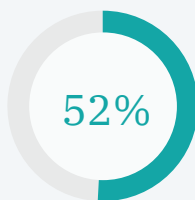
India



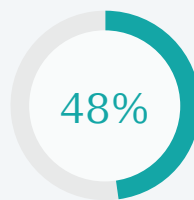
UAE



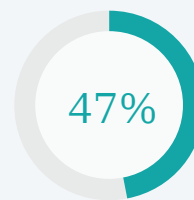
South Africa



Mexico



Brazil



Argentina

KEEPING UP AND GETTING AHEAD

Adapting to changing consumer preferences gives you and your brand a competitive advantage in international ecommerce.





Market expansion and diversification in the face of cooling ecommerce enthusiasm shields your brand from loss.



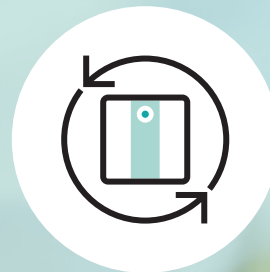
International ecommerce is growing but you need market-specific insights to succeed.



Recommerce is growing and a beneficial channel for brands.

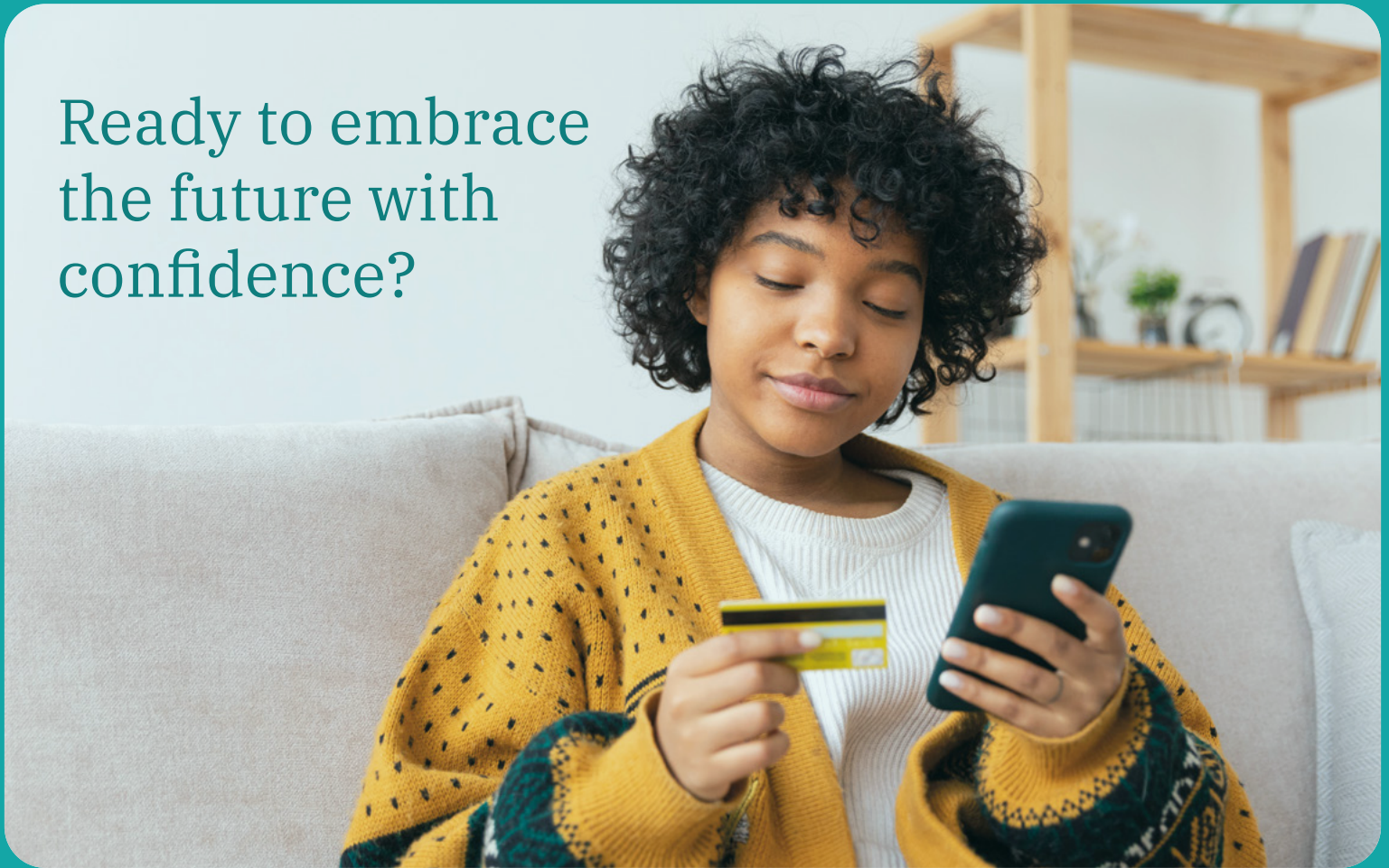


Localised payments win more customers and help you achieve revenue goals.



Smart shipping and returns strategies create exceptional customer experiences and grow revenue.

Ready to embrace
the future with
confidence?



Reach out and learn how
ESW can grow your brand
around the world.

growmybrand@esw.com