

Global Voices 2021

+ The Cross-Border Power Shopper



FEBRUARY 2021

Global Voices Survey

In December 2020, ESW surveyed consumers to learn about their behaviors and attitudes towards cross-border shopping.

SURVEY STATS

- + over **22,000 consumers**
- + from **11 countries**
- + consumers of **all ages**



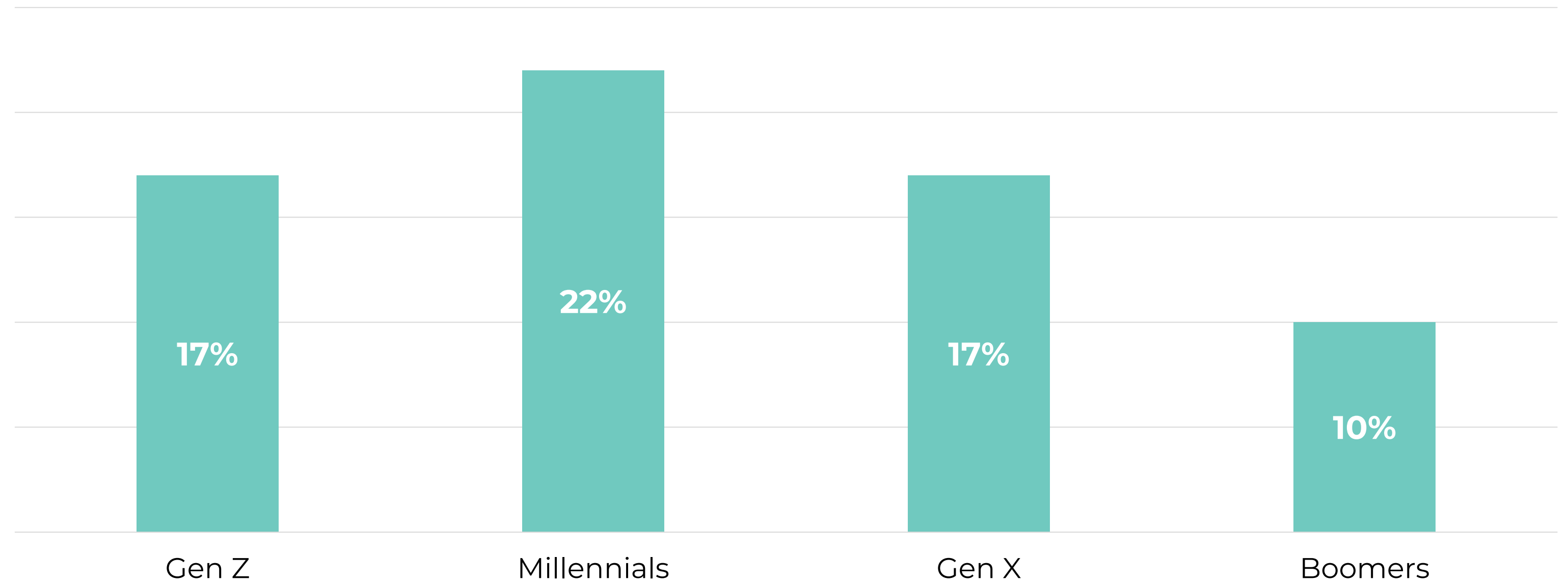


Meet the Cross-Border Power Shopper.

We identified a cohort of **consumers who spend over \$500 per year cross-border** and tend to shop from retailers and brands directly.

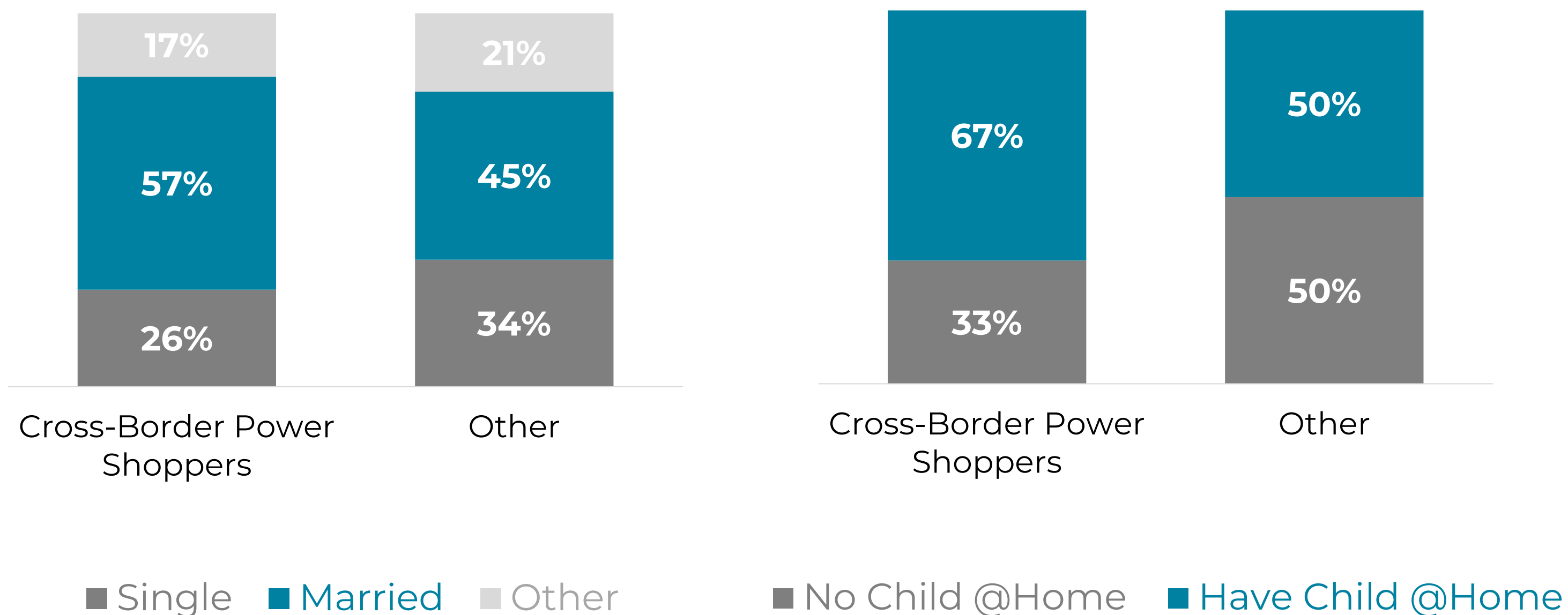
Who are the Cross-Border Power Shoppers?

The Millennial age group has the highest percentage of Cross-Border Power Shoppers. Millennials also make up the highest percentage of cross-border shoppers overall, at around 40%.



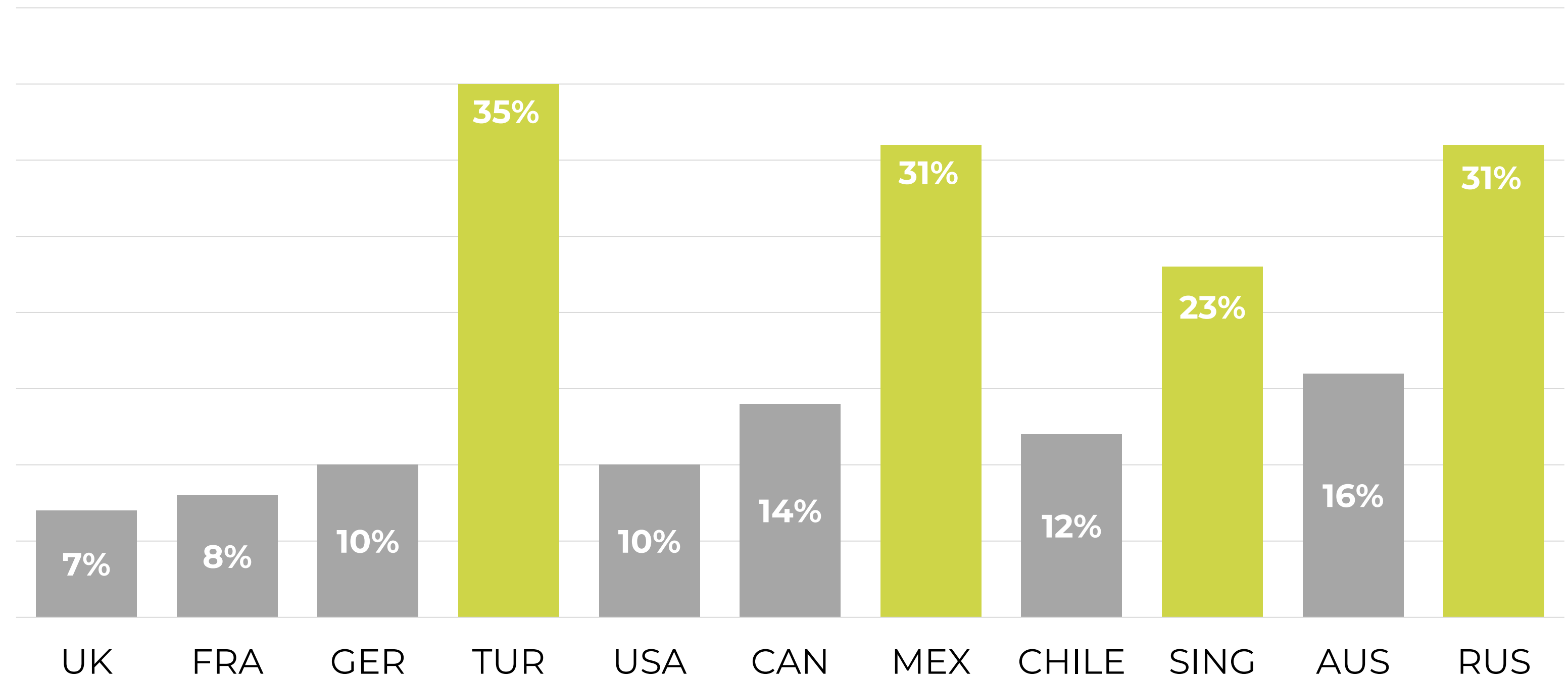
Who are the Cross-Border Power Shoppers?

Cross-Border Power Shoppers more likely to be married with children at home.



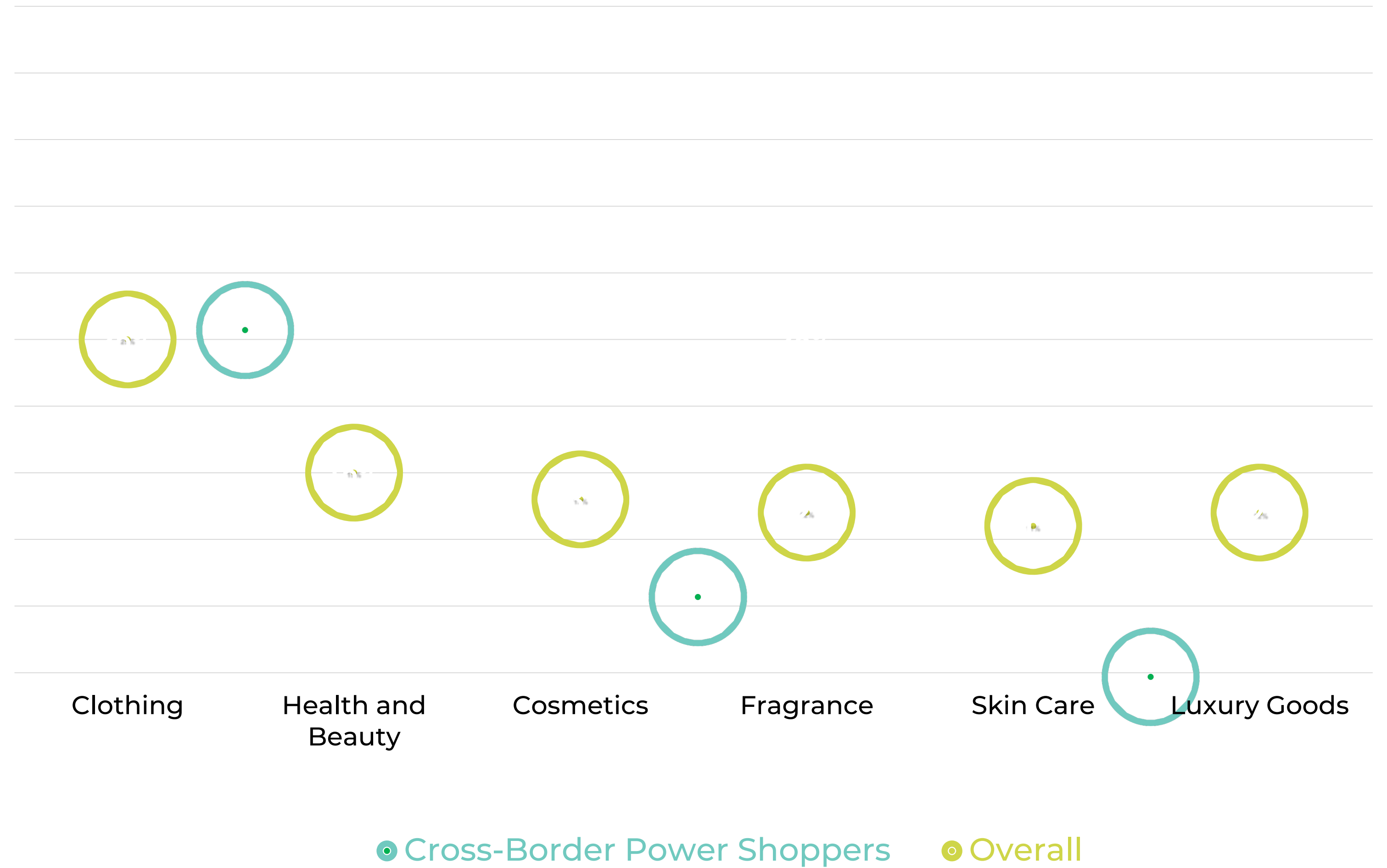
Who are the Cross-Border Power Shoppers?

Turkey, Mexico, Russia and Singapore have the highest percentages of Cross-Border Power Shoppers.



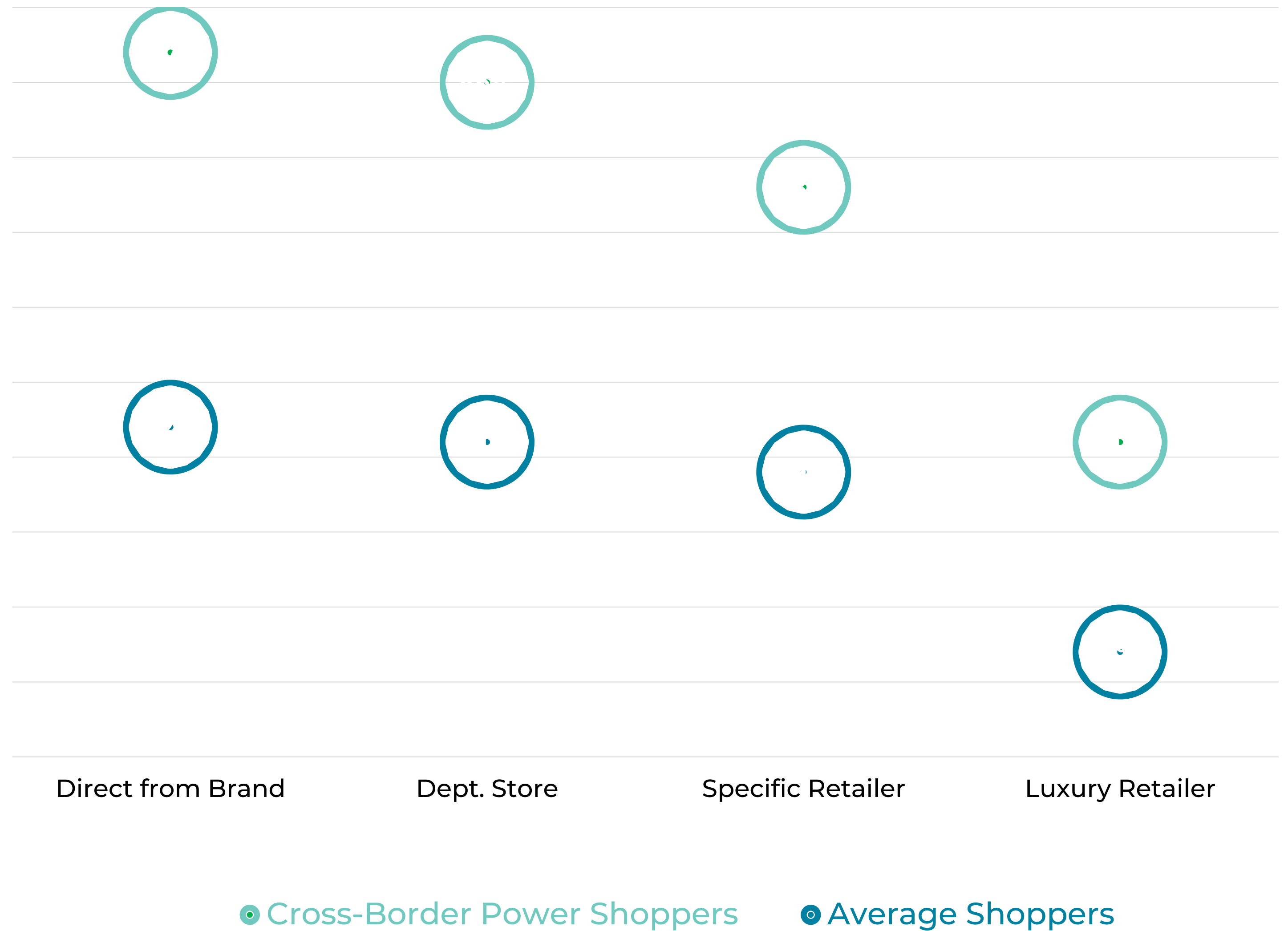
What Are They Buying?

Cross-Border Power Shoppers buy twice as much across every category.



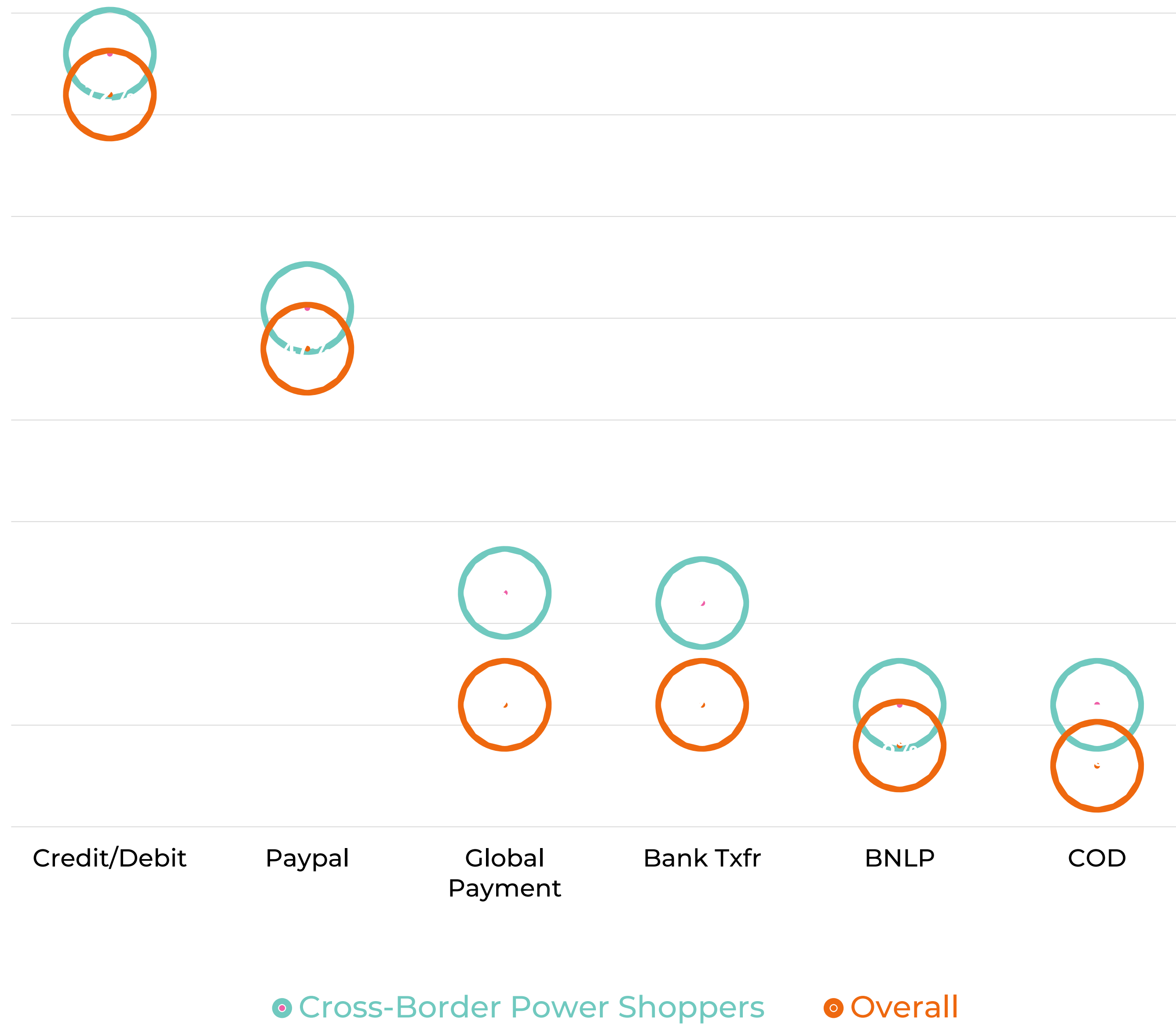
Where Are They Shopping?

Cross-Border Power Shoppers shop on brand and specific retail sites 2-3 times more often than average.



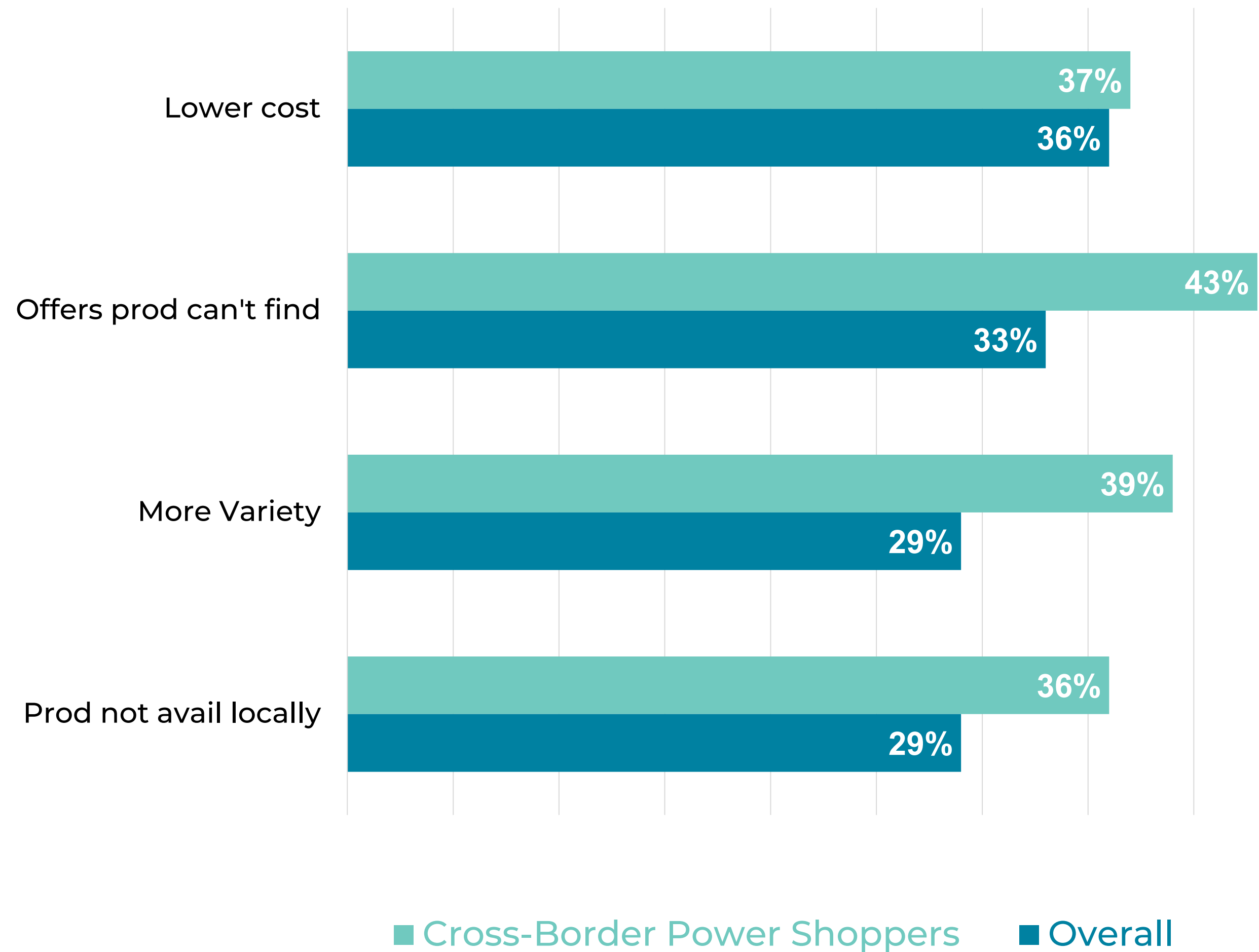
How Are They Paying?

Cross-Border Power Shoppers are twice as likely to use flexible or alternative payment methods.



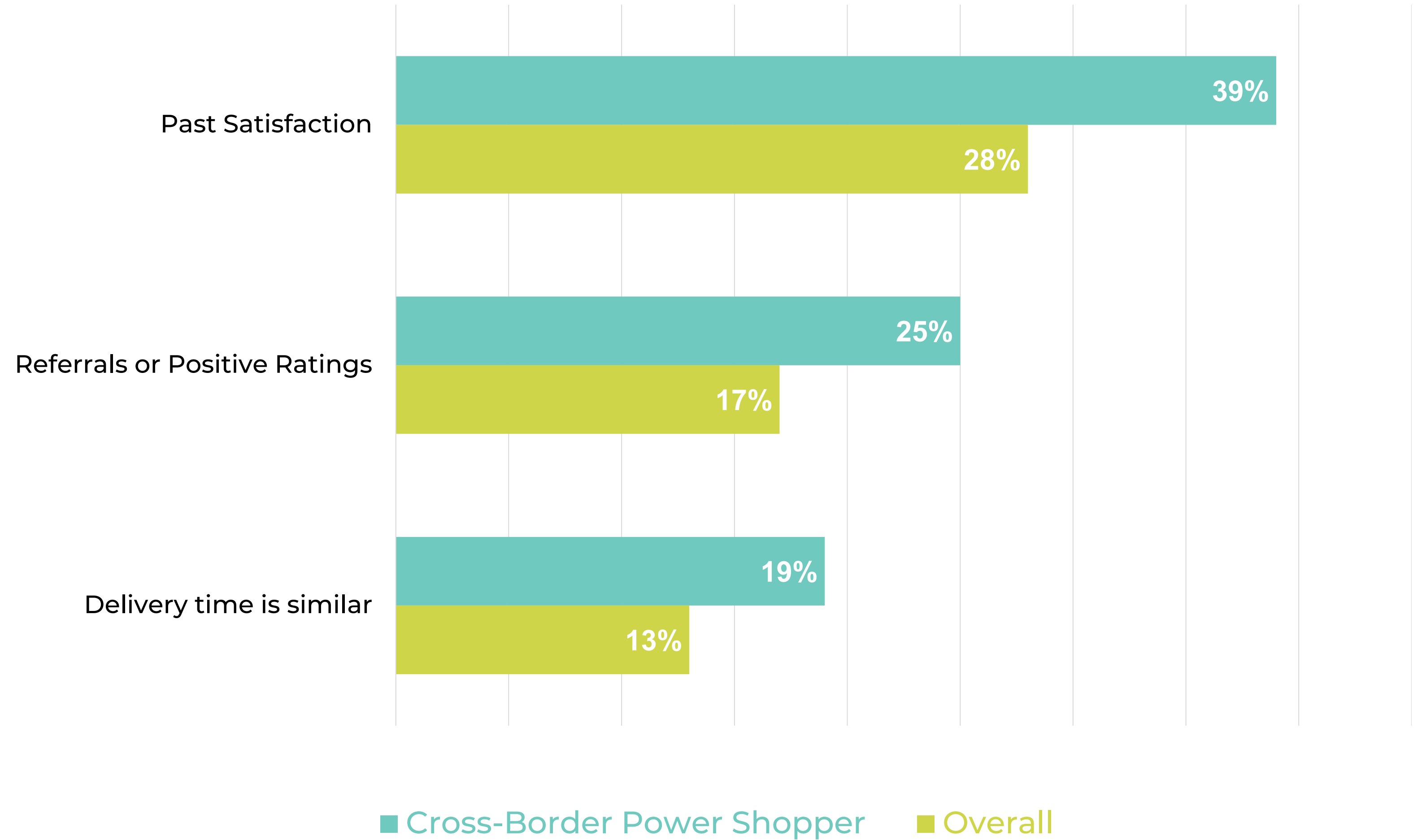
Why Do They Shop Cross-Border?

Cross-Border Power Shoppers are much more likely to look to other countries for variety and unique products, and less driven by cost.



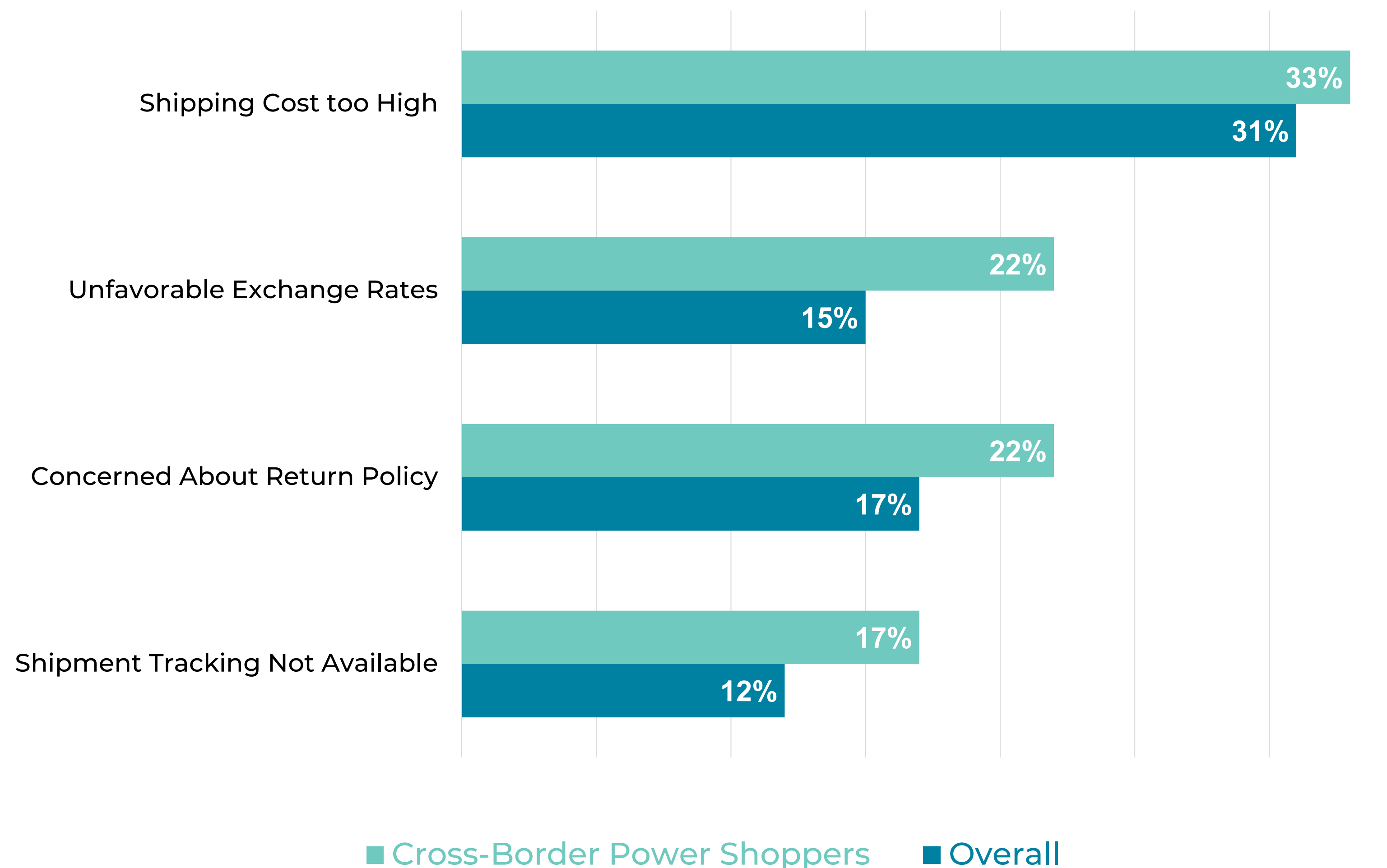
How Do They Choose Where To Shop?

Satisfied Power Shoppers are far more likely to become loyal customers.



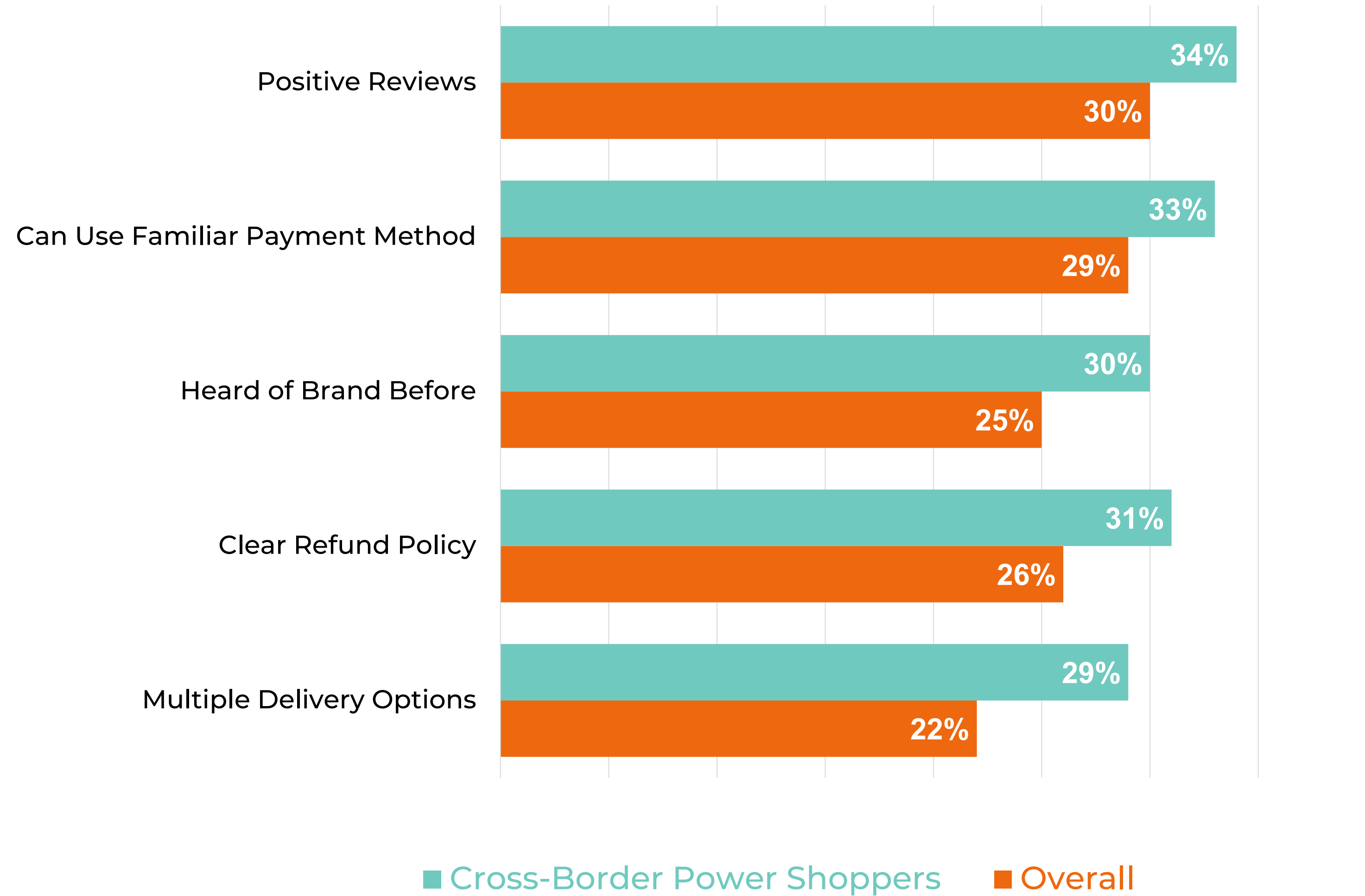
What Factors Keep Power Shoppers From Purchasing?

Like all consumers, Power Shoppers care about shipping costs. Far more sophisticated, they also pay more attention to exchange rates and customer service factors.



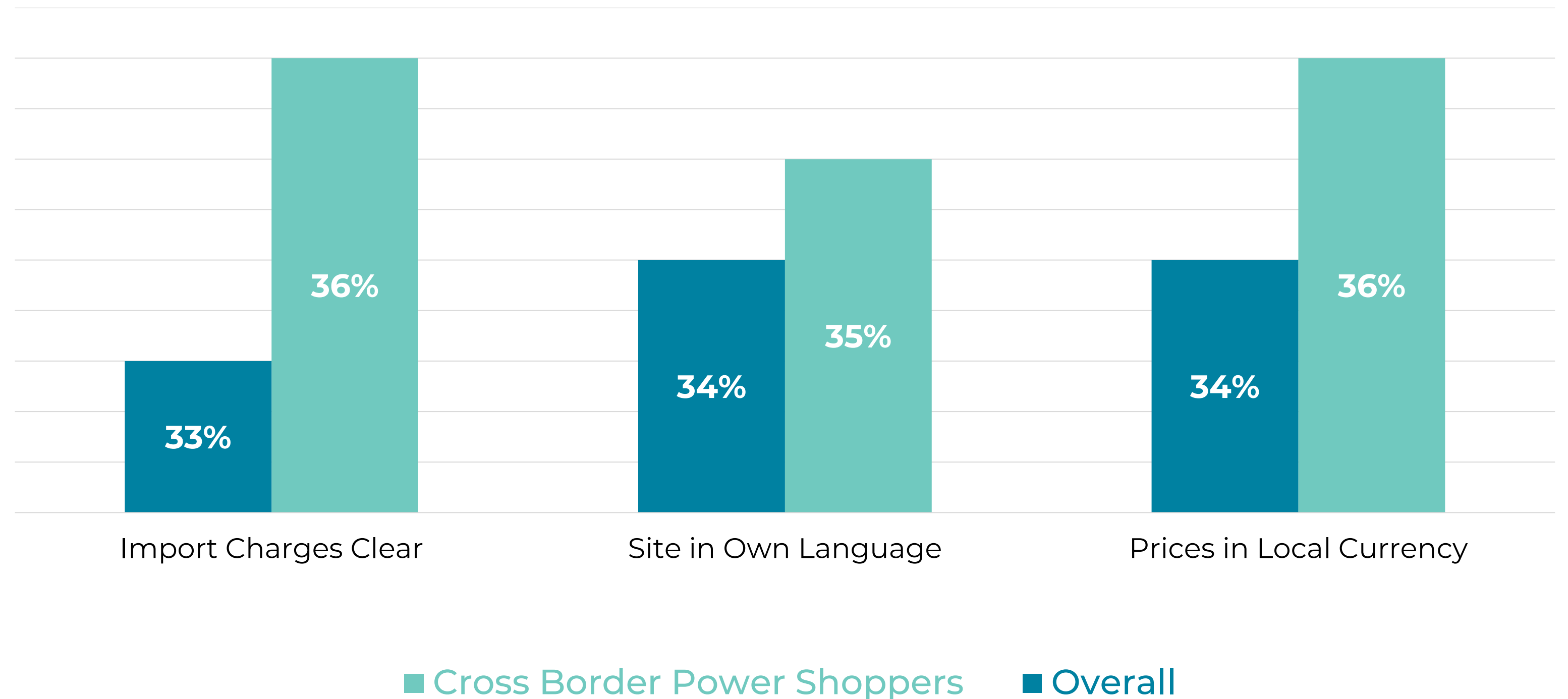
What Are The Dominant Factors In Purchase Decisions?

Cross-Border Power Shoppers are more concerned with flexible delivery and refund policies and rely on reviews more than average.



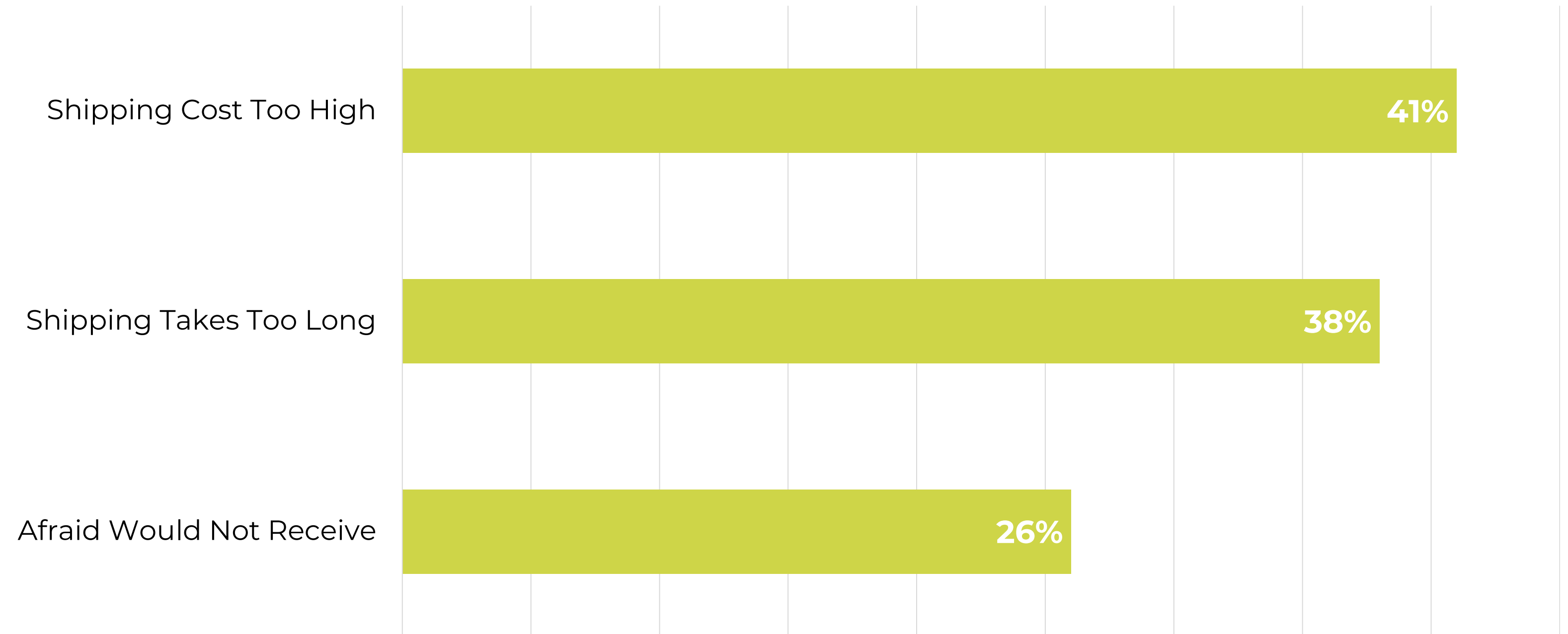
How Important Is Localization To Power Shoppers?

Sophisticated Cross-Border Power Shoppers expect no surprise charges, as well as their own currency and language.



What Keeps Power Shoppers From Completing a Purchase?

Concerns about shipping cost and timeframes dominate reasons not to purchase.



Key Takeaways—How to Attract Cross-Border Power Shoppers



ENGAGE MILLENNIALS

Prioritize engagement of Millennials in your global marketing efforts. They represent a high value shopper segment for all cross-border e-commerce



TARGET REGIONS

Cross-Border Power Shoppers are found in every region, but present a unique opportunity in Turkey, Mexico and Russia and Singapore



LOCALIZE SITE

Power Shoppers expect your site to be localized, with appropriate languages, local payment methods, currencies, and items that can't be found on other sites



CREATE POSITIVE SHOPPER EXPERIENCE

Make sure to deliver these aspects of a positive shopper experience to keep them coming back:

- + Estimated delivery dates
- + No surprise charges
- + Easy local returns/return to store
- + Clear refund policies
- + Reviews