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A GLOBAL VOICES REPORT

Omnichannel Commerce

Creating Value for Your
Brand and Your Customers



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Introduction

Today's shoppers utilise multiple channels to research, buy and return products. This omnichannel approach means that your potential customers may see an ad on social media, research your brand and products online, visit your retail location to see product in real life, buy online and perhaps return product to the retail location.

As consumers move seamlessly from one medium to another, successful brands and retailers move with them to meet and exceed their expectations at every step.

But implementing omnichannel solutions in new markets has challenges including understanding diverse customers and establishing an infrastructure to meet demands.

To better understand today's omnichannel shopper, we surveyed more than 18,000 shoppers in 18 countries. This Global Voices report breaks down who these shoppers are and how they behave so you can attract them and win them as loyal customers.





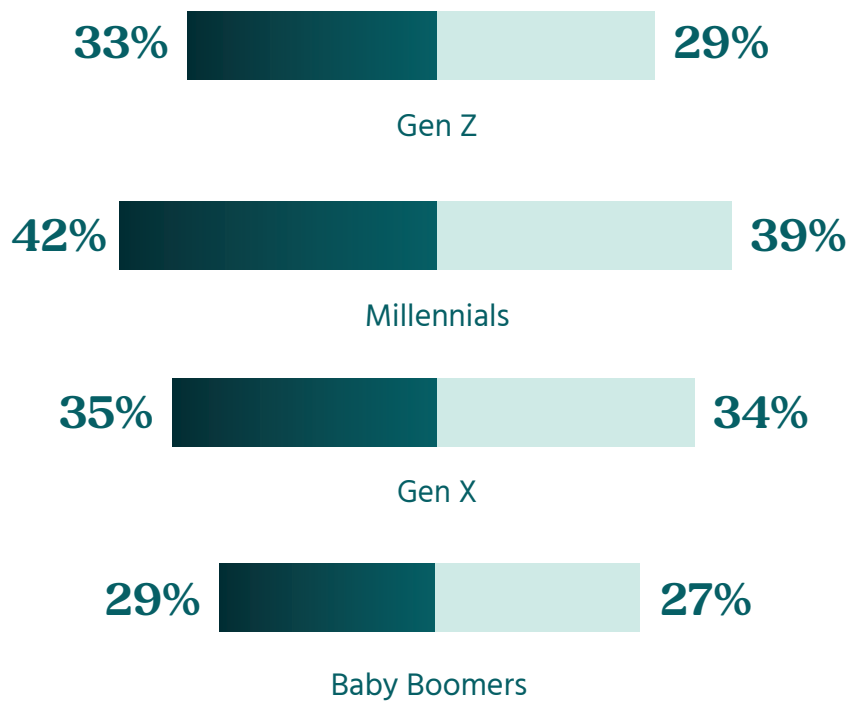
Why Omnichannel Matters



Establishing an omnichannel presence in new markets seems more complex than launching online only. Yet failing to build omnichannel in from the start puts your brand at a disadvantage and leaves revenue on the table.

Omnichannel shoppers make more purchases and spend more money than single-channel shoppers. What's more, omnichannel shopping is growing in popularity with more consumers opting to conduct commerce across channels.

Average Percent of Online Orders Per Year



- omnichannel shoppers
- non-omnichannel shoppers

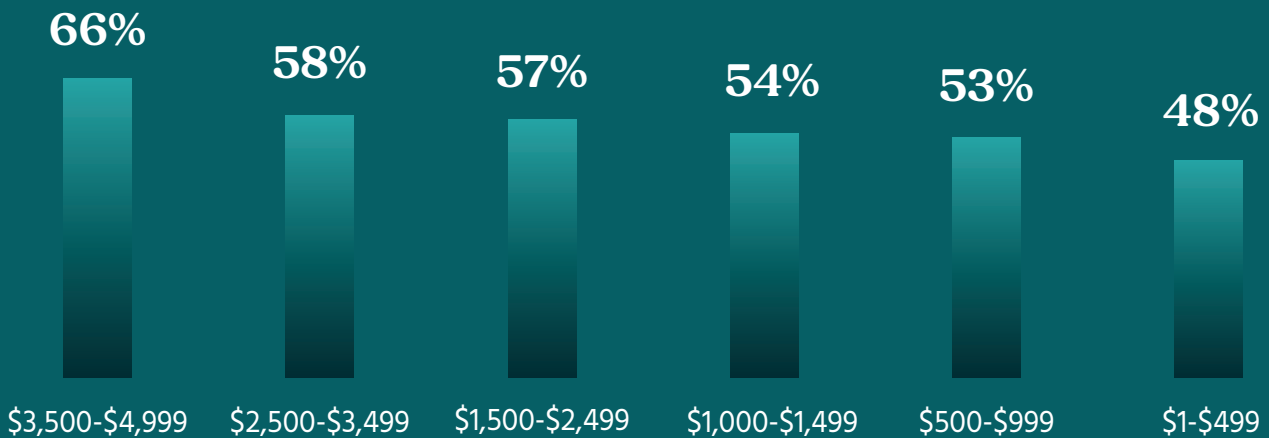




Omnichannel shoppers spend 15% more per year than non-omnichannel shoppers.

Of global shoppers spending \$3,500 to \$4,999 per year online, 66% are omnichannel shoppers. For shoppers spending less than \$500 per year online, only 48% are omnichannel shoppers.

Global Omnichannel Shoppers by Spending Amount



Global omnichannel usage year over year increased by 10%.



The World's Omnichannel Shoppers





Implementing omnichannel ecommerce and then finding and winning omnichannel shoppers is important for profitable international expansion.

Our survey found that overall, 52% of global shoppers are omnichannel shoppers. These shoppers reported behaviours that included:



Browsing in-store then buying online



Researching a product online then buying in-store



Buying online then collecting the purchase in-store



Buying online, collecting in-store and buying additional items in-store



Ordering online and returning in-store

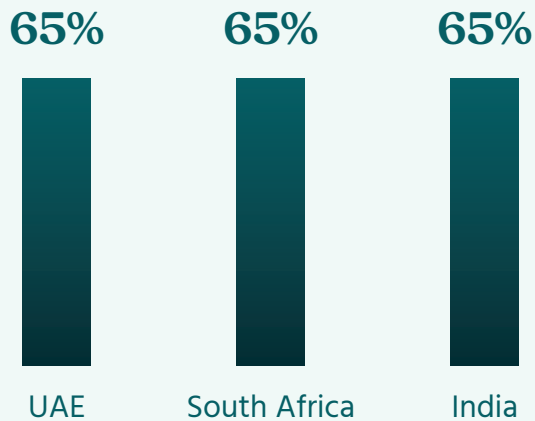


Omnichannel Demand Varies by Market

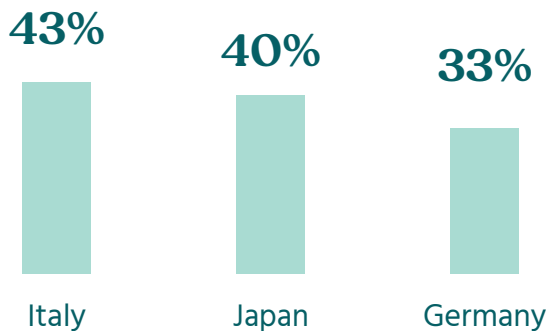
If your brand has undertaken international DTC expansion, you know that no two markets are the same. Shoppers in each country have their own preferences and expectations.

While globally more than half of consumers are omnichannel shoppers, certain markets have higher utilisation rates than others.

Countries with the Most Omnichannel Shoppers



Countries with the Fewest Omnichannel Shoppers



Millennials Lead in Omnichannel Usage

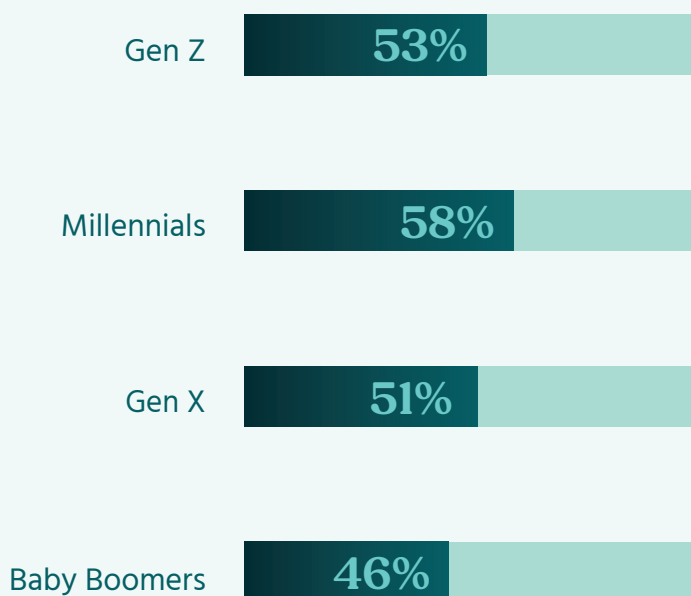
It is not surprising that younger consumers are more likely to be omnichannel shoppers. These generations grew up in a digital world and quickly adapt to new technology.

However, our survey found that more Millennials, not their younger Gen Z counterparts, are omnichannel shoppers. Nearly 6 in 10 Millennials use multiple channels to make a purchase compared to just over half of Gen Z.

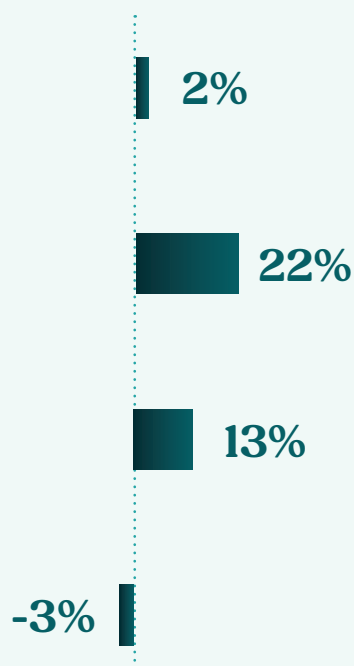
In our year over year comparison, Millennials and Gen X are driving global omnichannel growth.



Omnichannel Shoppers by Generation



Percent Change in Omnichannel Shopping by Generation from 2023-2024

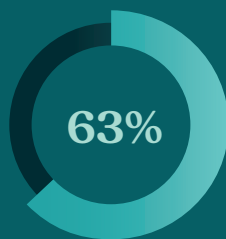


Hybrid Workers are Omnichannel Shoppers

Omnichannel increasingly defines more than shopping preferences; it is the way many consumers live their lives. They work and shop and interact with friends and family across channels and locations.

Navigating digital and physical spaces is such a part of our daily lives that it is not surprising that survey respondents who have hybrid work arrangements – working sometimes from home and sometimes from an office – are more likely to be omnichannel shoppers. More than 6 in 10 hybrid workers reported doing omnichannel shopping compared to just around half of people working either full-time in an office or full-time from home.

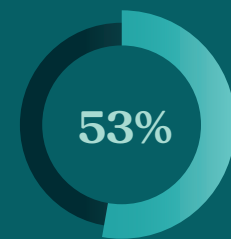
Percent of Omnichannel Shoppers by Work Arrangement



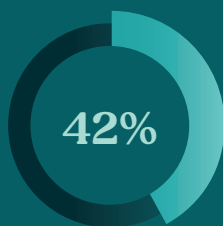
Hybrid



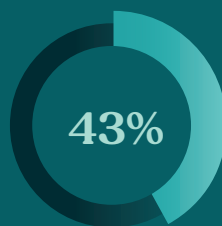
Full-time in the office



Full-time from home



Retired




Not employed





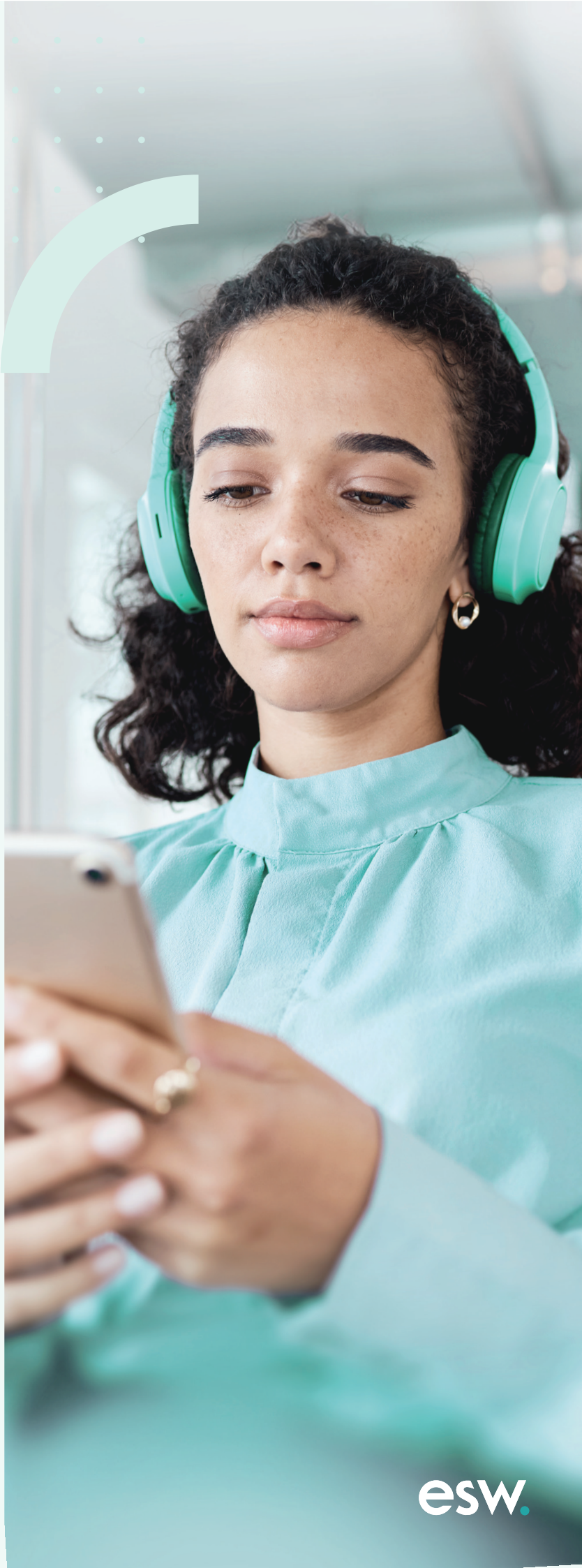
Omnichannel Shopper Behaviours and Attitudes





Knowing what kind of consumer is an omnichannel shopper and where to find them is half the battle. Once your brand has identified markets and audiences, you will want to better understand what these shoppers value and what motivates them to buy.

In general, omnichannel shoppers tend to be sustainably minded, brand-name shoppers. They use omnichannel options to shop for consumer electronics as well as cosmetics and are likely to participate in events like flash sales.



Top Product Categories for Omnichannel Shoppers

Researching, purchasing and making returns are all parts of the shopping journey. Omnichannel shoppers reported using a combination of online and in-store channels more often when they bought consumer electronics and cosmetics.

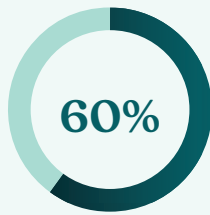


Omnichannel shopping across categories increased year over year, which is further evidence that to meet customer expectations, your brand should prioritise omnichannel.

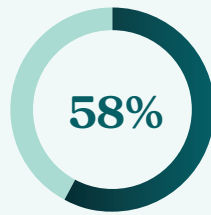


To optimise the omnichannel journey, your brand should create an exceptional experience that allows the shopper to move seamlessly between online and in-store channels.

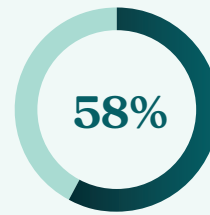
Omnichannel Usage by Category



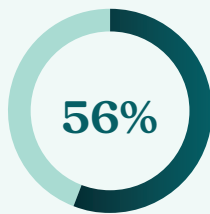
Consumer Electronics



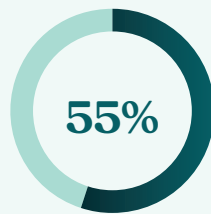
Cosmetics



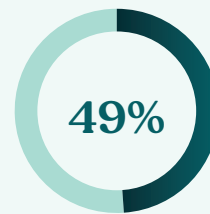
Hobbies, Toys, Games



Footwear



Clothing



Luxury

Increase in Omnichannel Usage by Category 2023-2024

36%



Luxury

30%



Consumer Electronics

26%



Cosmetics

22%



Footwear

19%



Apparel



Shoppers who participate in flash sale events are **35% more likely to be omnichannel shoppers.**

Sustainability Matters

Shoppers who opted for an omnichannel experience were more likely to be sustainably minded. We asked shoppers about their attitudes about commerce and the environment and assigned respondents a score according to how strongly they felt about environmental statements. Scores ranged from zero to 100 with zero being not sustainably minded and 100 being very sustainably minded. We found that the higher a shopper's sustainability score, the more likely they were to also be an omnichannel shopper.

Your brand can win omnichannel customers by not just meeting their expectations but also by touting your environmental record. Environmentally responsible processes like carbon-neutral delivery appeal to omnichannel shoppers.

Percent of Omnichannel Shoppers by Sustainability Score

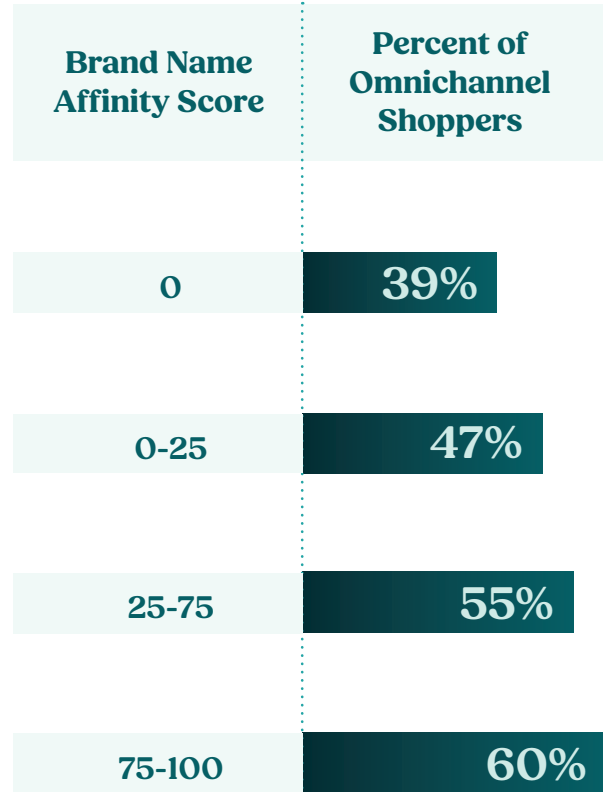


Brand Names Matter

Like sustainability, omnichannel shoppers were more likely to hold brand names in high regard. We assigned respondents brand name affinity scores based on how strongly they agreed that brand names mean quality, value and how likely they are to buy from a brand name. Scores were assigned from zero to 100 with zero meaning no brand-name affinity and 100 meaning very strong brand affinity. And again, there was a positive correlation between brand name affinity and omnichannel shopping.

Omnichannel consumers are already likely to hold your brand in high regard. Offering exceptional digital and in-store experiences only improves brand reputation and customer loyalty.

Percent of Omnichannel Shoppers by Brand Name Affinity Score

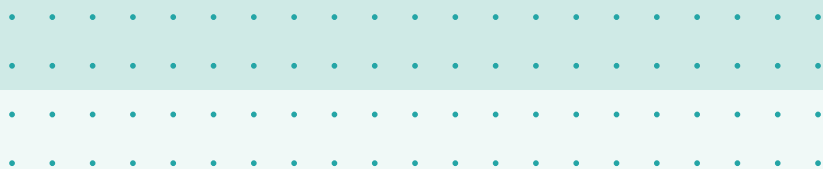


The Takeaway

Consumers around the world are increasingly interacting with brands across multiple digital and physical channels. To capture their loyalty, your brand needs to offer an omnichannel experience that moves seamlessly from the online world to the in-person world.

Omnichannel is flexible and lets your customers do business with you on their own terms which builds trust that leads to higher lifetime customer value.

But like every international ecommerce expansion decision, there is not a one-size-fits-all solution. Instead, you need to localise your omnichannel offerings in each market.



Accurate customer segmentation is a key first step to designing your omnichannel offering.



Millennials and Gen Z are the highest utilisers of omnichannel shopping



Omnichannel shoppers will respond to environmental messaging



Hybrid workers are more likely to be omnichannel shoppers



Brand-name enthusiasts are more likely to use omnichannel offerings



Once you have targeted messaging to your audience, you need to be able to deliver on your promise for a world-class experience. But that can be a complex undertaking – especially in international markets.

To reduce that complexity and achieve speed-to-market while maintaining a high-quality customer experience, engage a partner with the market expertise and logistics infrastructure to make sure your customers have exceptional experiences from day one.

Contact ESW to find out how we have delivered results for some of the world's best-loved brands.

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. 18,679 surveys were completed between October 31st and November 14th 2023. Overall margin of error is approximately 5% at a 95% confidence level, varying by country population size.

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