Common Sense Advisory

Global Dataset™

Can't Read, Won't Buy: Why Language Matters on Global Websites

An International Survey of Global Consumer Buying Preferences

By Donald A. DePalma,
Benjamin B. Sargent, and
Renato S. Beninatto

September 2006

Can't Read, Won't Buy: Why Language Matters on Global Websites

By Donald A. DePalma, Benjamin B. Sargent, and Renato S. Beninatto

September 2006

ISBN: 1-933555-30-0

Published by:

Common Sense Advisory, Inc.
100 Merrimack Street
Suite 301
Lowell, MA 01852-1708 USA
+1.866.510.6101 or +1.978.275.0500
info@commonsenseadvisory.com
www.commonsenseadvisory.com

Table of Contents

Executive Summary 1
Does Language Matter?....................3
The Survey Demographics: 2,430 Consumers in Eight Countries 3
English-Language Sites Attract Foreign Visitors....................5
International Visitors Spend More Time at Sites in Their Language 7
Consumers Prefer Buying from Sites in Their Language 8
How International Consumers Buy from English-Language Websites 9
International Buyers Express Their Language Preferences....................12
International Buyers Almost Evenly Split on Home-Language Purchases....................13
Most Consumers Feel Discomfort in Other Languages, But May Still Buy 14
All Other Things Being Equal, Consumers Prefer Buying in Their Language ...15
Mother Tongue Content Becomes More Important over Product Life Cycle.....17
More than Half of All Visitors Sometimes Turn to Machine Translation 20
Brand Trumps Language, But Language Beats a Lower Price 22
Why Foreign Visitors Abandon Websites 24
On the Global Web, Language and Localization Matter More Than Ever 27
About Common Sense Advisory 28
About Our Data Collection Underwriters 28

Figures

Figure 1: Countries Surveyed for this Report and Language Competence....................4
Figure 2: English Sites Draw Visitors Regardless of Linguistic Competence 5
Figure 3: Nationality Affects Visitation to English-Language Sites 6
Figure 4: Consumers Prefer Spending Time on Sites in Their Own Language 7
Figure 5: Most Foreign Visitors Do Not Buy on English-Language Websites....................9
Figure 6: Nationality Affects Purchases from English-Language Sites 10
Figure 7: Language Matters Most When Buying Complex or Expensive Things 11
Figure 8: Non-Anglophone Visitors Most Likely to Buy at Sites in Own Language...13
Figure 9: Most French and Japanese Consumers Buy Only in Their Language....................14
Figure 10: Actual Buying Behavior Aside, Some Are Comfortable in English....................15
Figure 11: Most Consumers Prefer Products in their Own Language 16
Figure 12: Most Buyers Will Pay More for Their Own Language 17
Figure 13: Language Becomes More of an Issue When Buyers Need Help 18
Figure 14: Bad Translations Are Better than No Translations 19
Figure 15: Some Nationalities Tolerate Bad Translations More than Others....................20
Figure 16: Most Visitors Use Online Machine Translation Sometimes....................21
Figure 17: A Global Brand Trumps Language and Price....................23
Figure 18: Perceived Value of a Global Brand Varies by Nationality 24
Figure 19: People Leave Websites for More than Language Issues....................25
Figure 20: Necessity Drives Purchases from English-Language Websites....................27

This page is intentionally blank.

Executive Summary

Companies large and small religiously devote marketing, sales, support, and product development funds to educating prospects and convincing them of their products' value – except when it comes to international markets.[1] As our earlier research has shown, communication tends toward incomplete or inaccurate translations. The assumption that potential buyers "probably speak English" drives inadequate localization, warring against the gut feeling that people are unlikely to buy products they cannot understand or that do not appeal to them.

As a result, many firms still debate whether it makes business sense to globalize their online marketing, online commerce sites, and call centers. Nonetheless, research dating back to 1998 indicates a high propensity for people to buy in their own language.[2] Until now, there has been no large-scale, independent behavioral study of consumers to validate either argument.[3]

This report describes the results of an eight-nation survey conducted in July and August 2006. It includes the responses from over 2,400 consumers who answered questions about their behavior and preferences for website visits and purchases, in English and in their own language, across a wide range of product types.

- **The survey crossed three continents.** We used a third-party consumer panel company to invite participants to take our poll and collect the results. Our sample represented three continents, with at least 300 consumers each from Brazil, China (PRC), France, Germany, Japan, Russia, Spain, and Turkey. We chose these eight non-Anglophone countries because they have large populations, are economically significant, and represent a mix of nationalities generally perceived as linguistically tolerant or intolerant.

- **Most people prefer buying in their own language.** Our data set only includes web users who purchased online, so results are representative of "buyers" rather than visitors in general. No one should be surprised to find that more than half our sample (52.4%) buys only at websites where the information is presented in their language. More than 60 percent of consumers in France and Japan told us they buy only from such sites. When we factored in language competence, we found that people with no or low English skills were six times more likely not to buy from Anglophone sites than their countrymen who were proficient in English.

- **Language significantly influenced more important purchases.** The vast majority (85.3%) of our respondents feels that having pre-purchase information in their own language is a critical factor in buying insurance and other financial services. Conversely, just 45.8 percent of the sample told us that language is important to buying clothes on the web. The more valuable an item, the more likely it is that someone will want to read about the product and buy it in their own language.

- **It takes more than local language to sell something.** Over two-thirds (67.4%) visit English-language sites monthly or more frequently, but just a quarter (25.5%) regularly purchase goods or services at those properties. Even with information available in the local language, the inability to use their own credit cards or currency stymies many international buyers. Converting those international browsers to buyers requires translation plus improved site performance and commercial enablers such as credit card and country-specific transaction support.

- **Global brands trump language and price.** Half of our sample (50.8%) would buy a global brand over a local one, even without translated information. Looking at individual countries, just Germany and Japan fell below the 50-percent mark. However, having information in their own language was more important to 56.2 percent of our total sample than a low price.

Finally, we note that this report is about more than marketing in English rather than in a local language. Ever since former U.S. vice president Al Gore famously "invented" the internet, it has been dominated by English (or at least American) content. Thus, when we contrast linguistic behaviors and preferences in this dataset, we focus our attention on the web's dominant language paradigm.

However, we consider English to be a proxy for any language in which a company chooses to market to people who speak a different tongue. For example, Western Europeans and Asians regularly target U.S. audiences, most of them doing so in English. We believe that the findings represent best practices for doing business in any language in any foreign market – for example, Japanese selling to Germans and Czechs selling to Thais.

Future reports on this dataset will focus on the eight countries, drill-down questions into particular behaviors, and consumer clusters that incorporate both demographic information (age and gender) and behavioral data (what they purchased) that tells us something about how they act with regard to English-language or natal-language sites, by country.

Does Language Matter?

What kind of financial return should a company expect when it globalizes its website? If it translates the e-commerce pages, will more people buy? Or is English enough for the still English-saturated web? Inquiring marketing executives need to know. To quantify what actual benefits companies get from tailoring their marketing and sales material to national audiences, we surveyed over 2,400 consumers in eight non-English-speaking countries about their online buying habits and preferences.

Our conclusion: Yes, language does matter, but that's not all. Even for consumers who feel comfortable in English, many prefer buying in their own language. Most want customer support that is similarly accessible. And with sites lacking local currency or transaction support, many non-native speakers discover that buying from English-language sites is literally an impossible undertaking.

The Survey Demographics: 2,430 Consumers in Eight Countries

Our goal in undertaking this research was to establish correlations among language, visitation to English-language sites, and the likelihood to purchase various goods and services from these sites. To this end we surveyed over 2,400 consumers from eight non-Anglophone countries in Europe, Asia, and South America in July 2006. At least 300 people completed the online surveys conducted in each of eight languages (see Figure 1). We included data only from consumers who had bought something on the internet.

Of the 2,430 web buyers in our sample, more men (57%) completed the survey than did women. Participants ranged across various age groups: 25 years and under (24%), 26 to 35 (44.4%), 36 to 45 (19.1%), 46 to 60 (11.1%), and 61 and over (1.4%). They accessed the internet in various ways, some from home, office, and public access points. The most popular connectivity was broadband from home (72.1%), then high-speed connections at work (46.3%). Some participants still use dial-up from home (14.2%) and a small number from work (4.2%). Finally, another contingent jacked in through an internet café (8.6%).

We focus our analysis on the biggest determinant of behavior across the entire sample, competence in English. We asked participants to characterize their ability to read and understand English. As a subjective assessment, it indicates their confidence in using English to make purchasing decisions.

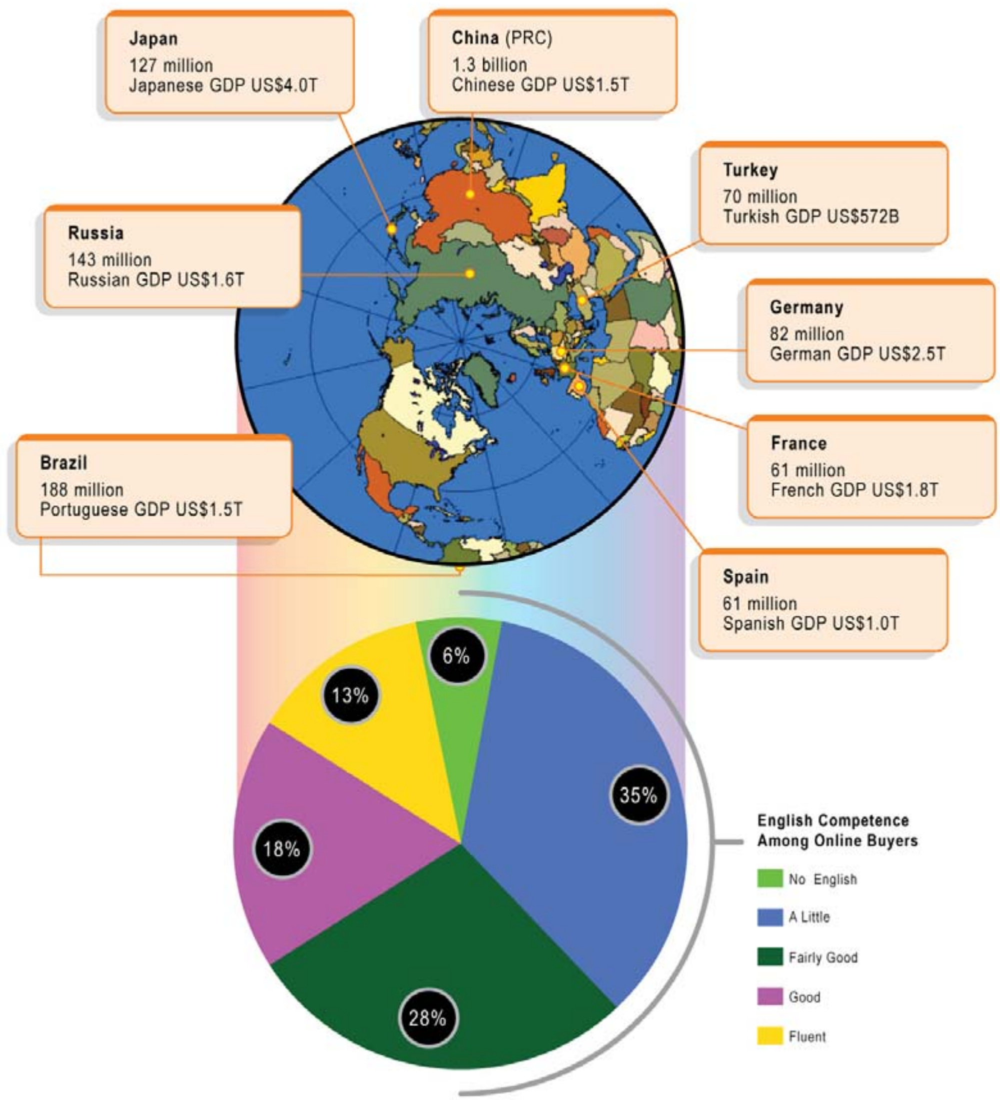

Figure 1: Countries Surveyed for this Report and Language Competence
Source: CIA World Factbook – GDP represented as Purchasing Power Parity (PPP)

Worldwide this subjective rating included respondents with no English (6.5%), a little (34.7%), fairly good (27.7%), good (17.9%), and fluent (13.3%). For our analysis we boiled these five groups down to two categories, "none or low" (for no English or a little) versus "proficient" ability in English (for those who say it's fairly good, good, or fluent). Most of our analysis pivots on this variable, but we also cite country-specific differences in our sample as a prelude to a future country-by-country analysis of the data.

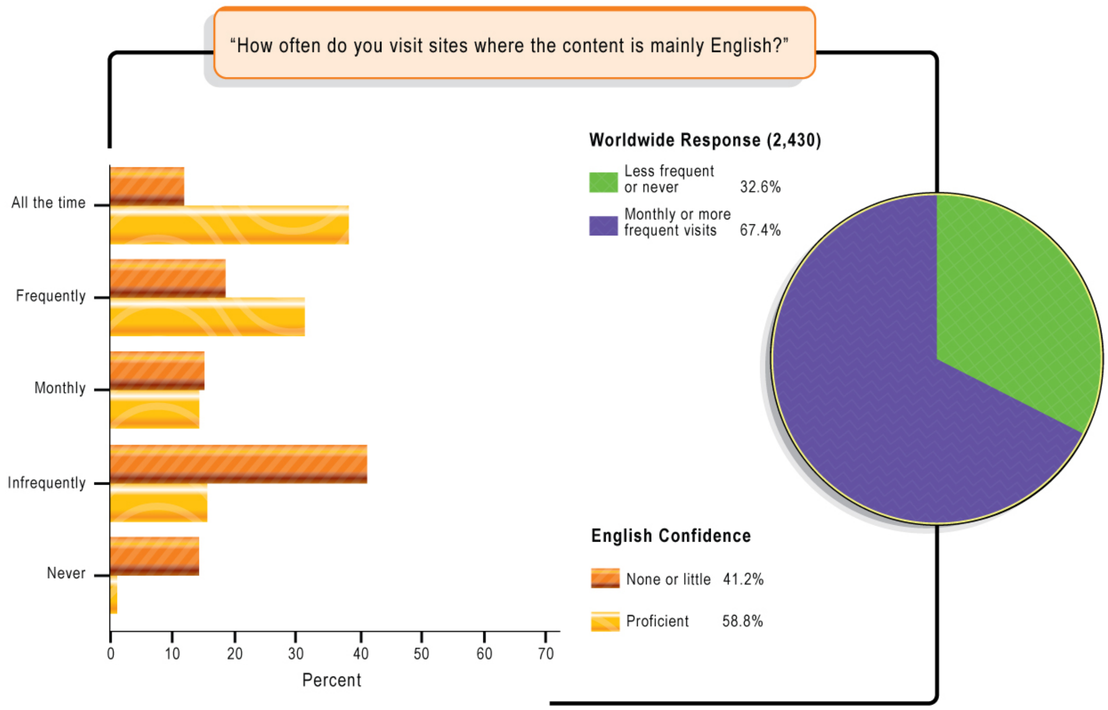

Figure 2: English Sites Draw Visitors Regardless of Linguistic Competence
Source: Common Sense Advisory, Inc.

English-Language Sites Attract Foreign Visitors

Whether the websites are hosted by American, English, Australian, or even companies in non-Anglophone countries, they attract visitors from around the world. We asked our respondents how often they visit sites where the content is mainly English. The frequency choices included "more than three times per week," "once a week," "monthly," "less than once per month," and "never."

For this analysis, we compressed these five options into two groups: 1) those who visit English-language sites at least monthly and 2) people who rarely or never drop by such sites (see Figure 2).

- **Visits to English-language sites remain high.** Over two-thirds (67.4%) of our eight-nation sample fell into the first category, while nearly one-third (32.6%) of our respondents seldom or never visit English-language sites. Why do so many people visit websites not offered in their mother tongue? Most of the

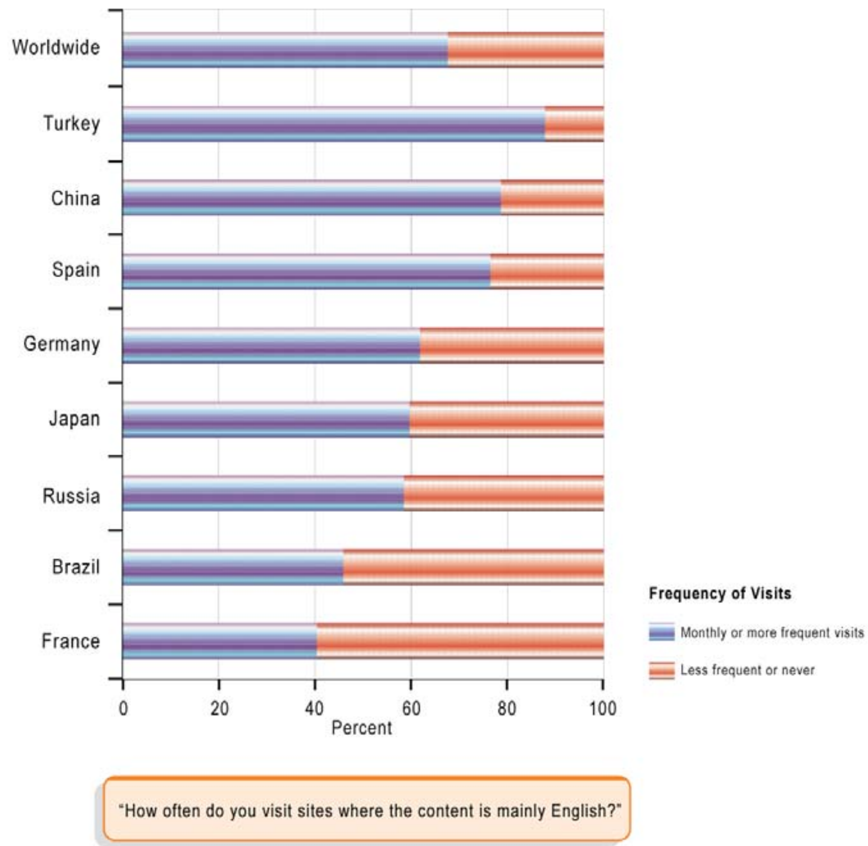

Figure 3: Nationality Affects Visitation to English-Language Sites
Source: Common Sense Advisory, Inc.

world's best known brands focus their online spending on their English-language properties, and many heavily trafficked websites show their best face to Anglophones.[4]

- **People with limited English skills stop by, but less frequently.** We questioned whether consumer confidence in English as a second language factored into their decision to visit an Anglophone site. We found that 45 percent of the participants with no-or-low confidence in their English were regular visitors, while 83 percent of those who felt more competent in their language skills made at least monthly visits to English-language sites.

- **Some nationalities are less inclined to visit than others.** Country of origin determined the frequency of visits to English-language destinations (see Figure 3). Disregarding the language confidence variable, we found that 59 percent of our French respondents avoid English-language sites, while 87.6 percent of the Turks show up at least once a month. We conjectured that

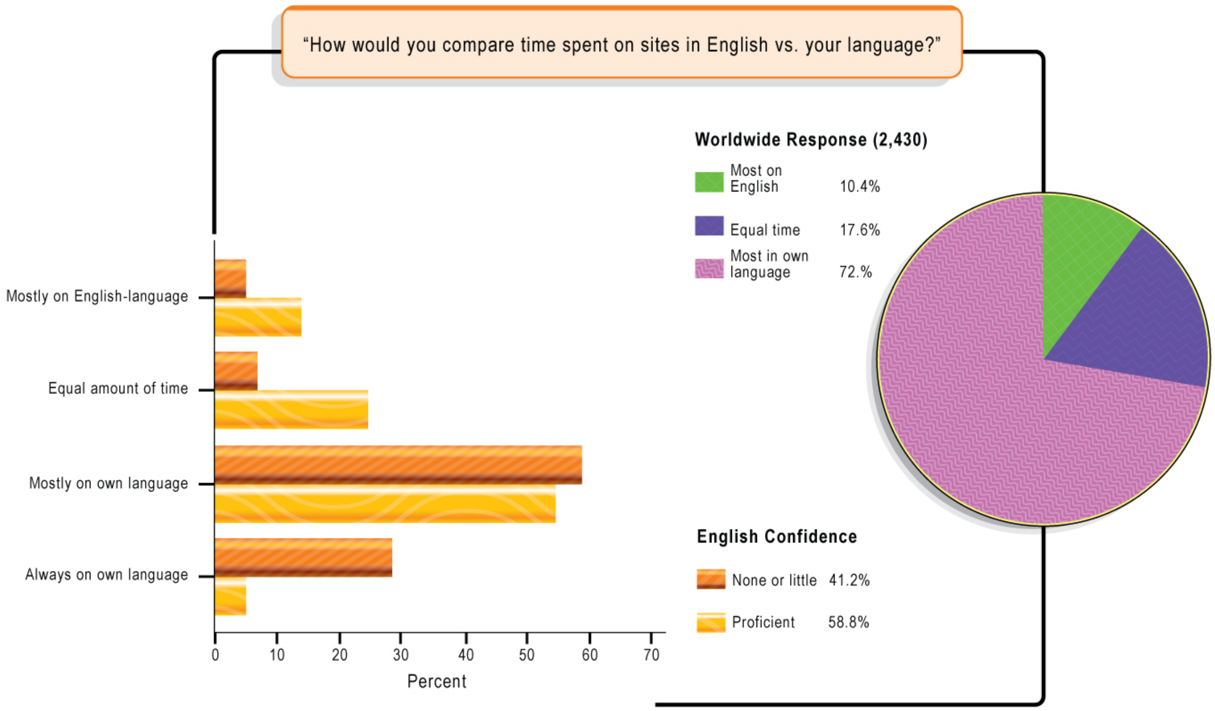

Figure 4: Consumers Prefer Spending Time on Sites in Their Own Language
Source: Common Sense Advisory, Inc.

the paucity of in-language content was a determinant for Turkey and China until we factored in the high visitation rates of Spain and Germany. We will study this phenomenon in upcoming country-specific reports on this dataset.

International Visitors Spend More Time at Sites in Their Language

Once we found out that our survey respondents were indeed visiting English-language sites, we clocked how much time they spent there compared to destinations offered in their own language (see Figure 4). We gave them four choices equating to "most of my time is spent on English-language websites," "I spend about an equal amount of time on sites in my own language and English," "I spend most of my time on sites in my own language," and "I visit only sites in my own language."

- **Most people favor quality web time in their mother tongue.** Across the eight countries, nearly three quarters (72.1%) spend most or all of their time on sites in their own language. Less than a fifth (17.6%) split their visitation equally between natal-language and Anglophones sites, while just one out of 10 respondents (10.4%) favors English properties.

- **Language competence ups the ante.** We found that survey participants with no-or-low confidence in their English were six times more likely to avoid English sites; 89.3% spend most or all of their time on sites in their native language. For those with more linguistic skills at their command, 60.6 percent said they devote more of their web visiting time to natal language addresses. While we did not ask which English-language sites attracted those with little or no competence, we suspect they would be media-heavy and search sites for which linguistic competence would be less of an issue.

- **Brazilians are more likely than most to spend lots of time at English sites.** With the language proficiency variable removed, we found that Brazilians had the greatest tolerance for English-language sites – just 32.5 percent of them spend most or all of their time on Portuguese sites, less than the 40.8 percent who dedicated most of their visits to Anglophone properties. The French (89.9%) and Japanese (87.1%) tended to spend more time on mother-tongue sites more than did any other nationality.

Even for those respondents comfortable using English, most people favor time at sites published in their own language. Without a compelling need, they won't find a reason to spend very much time at your site. Over time, English-language sites should expect fewer foreign visitors as more information resources come online in local language. The need – that is, the lack of competing offers and their own language – that drives people to English sites will diminish.

Consumers Prefer Buying from Sites in Their Language

We also asked our respondents about how often they purchased goods or services from English-language sites. The choices paralleled the site visitation question: "most of my purchases are from English-language websites," "some are from English-language websites," "I rarely buy from English-language websites," and "I never buy from English-language websites."

Across the worldwide sample, only one-quarter (25.5%) of our respondents do most or at least some of their shopping from English-language sites – compared with the 67.4 percent who visit these sites regularly (see Figure 5). Just 10 percent of the respondents with limited English told us that they make most or all of their online purchases from Anglophone websites. They were six times more likely to answer that they buy rarely or never from English sites than those who had more confidence in their English. The fact that some users with no or low competence buy at all from English sites indicates some unmet need – typically a product or service that is not available from a site in their own tongue. English-language confidence raises that purchasing percentage to 37.

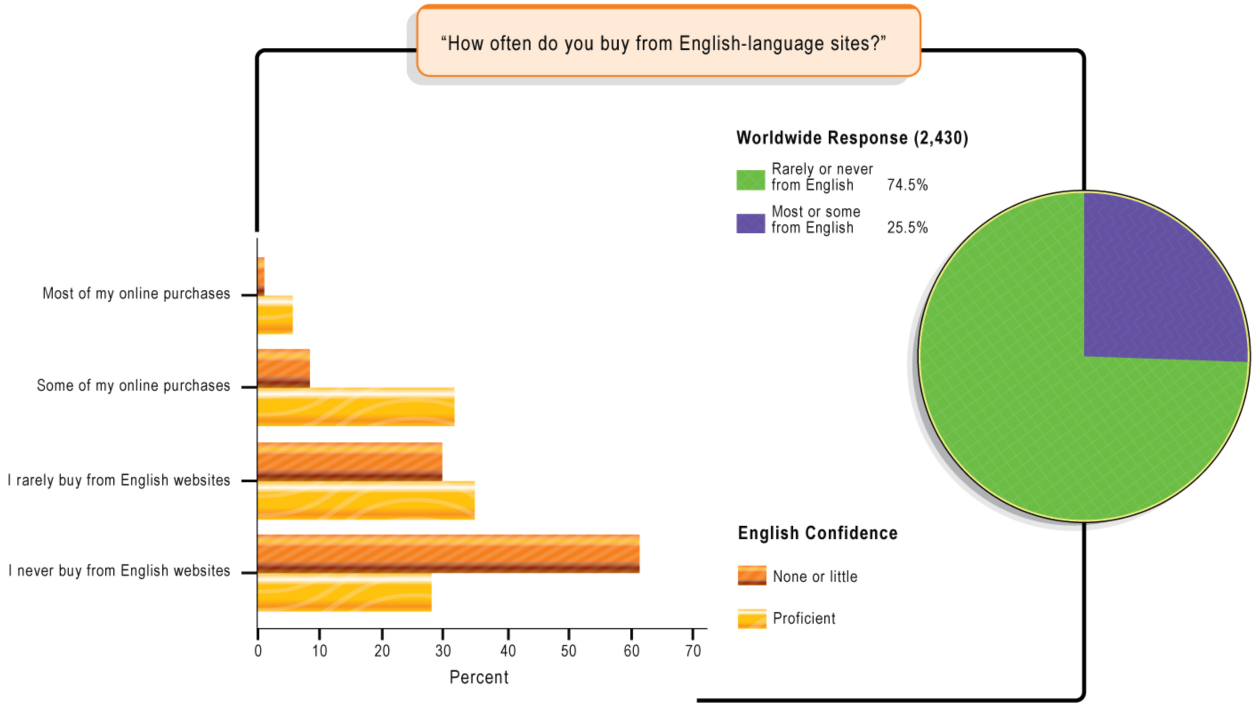

Figure 5: Most Foreign Visitors Do Not Buy on English-Language Websites
Source: Common Sense Advisory, Inc.

There is a strong correlation between the time people spend on a website (Figure 4) and their propensity to buy (Figure 5). Thus, the more someone browses, the more likely he is to buy. Language becomes a stickiness factor, but it is not the only thing that limits buying. Some sites prevent foreign consumers from purchasing because they have not adapted their registration code and commerce engines to support postal codes or transactions in other currencies. [5]

Nationality also enters the buying equation; French and Russian consumers much less likely than Spaniards to buy from an English-language site (see Figure 6). Notwithstanding transactional limitations, this disparity between visitation and buying rates offers compelling evidence that purchasing sets a higher bar for language than for mere browsing.

How International Consumers Buy from English-Language Websites

We asked survey respondents how important it was to them to have product communications such as advertising, labeling, packaging, user manual, website, and help desk available in their own language. They responded to a three-step

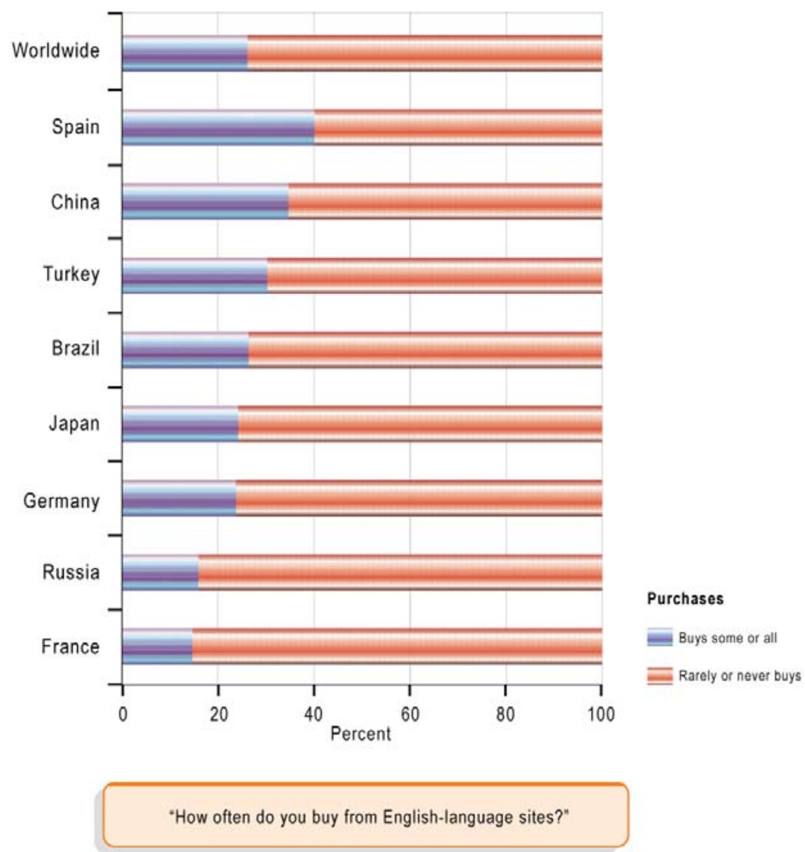

Figure 6: Nationality Affects Purchases from English-Language Sites
Source: Common Sense Advisory, Inc.

Likert scale of "very important," "important," and "not important." We also gave them the option of "not applicable or don't know" for those who did not make a purchase in all of the 14 product categories about which we asked. We consolidated these various purchases into four broader groupings (see Figure 7).

- **Services.** We asked about their purchases of less tangible products such as travel and entertainment (airline tickets, rental car reservations, hotel bookings, sporting events, restaurants, and film or theater tickets) and banking, insurance, and other financial services.

  Response: Across our worldwide sample, four out of five (79.6%) told us they want communications in their mother tongue. For no-or-low proficiency buyers, the number of those thinking that language is important or very important jumped to 85.1 percent. Those confident in their English-language ability said it was very valuable, too, with 75.8 percent favoring in-language information in making their decision to buy such services.

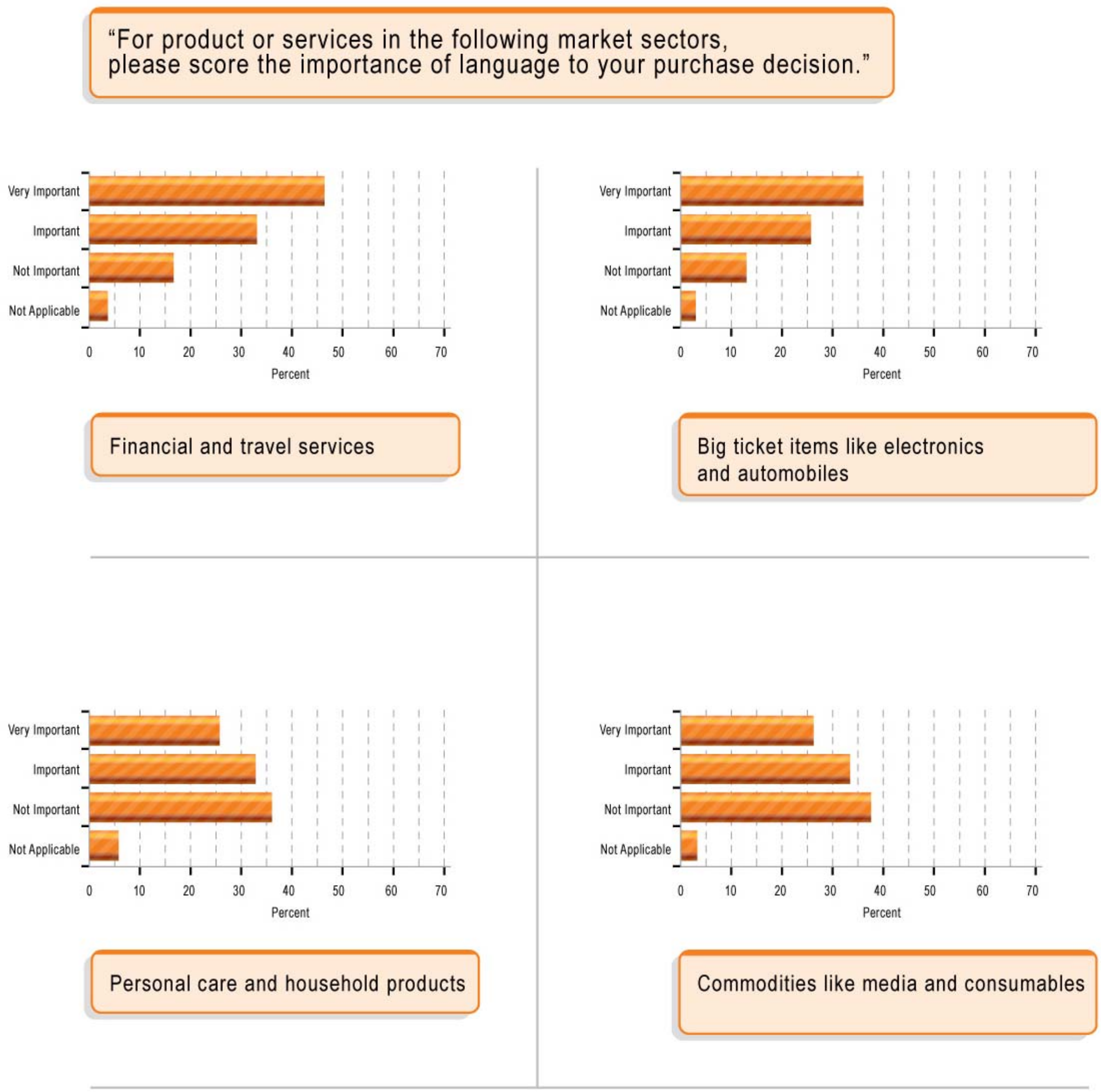

Figure 7: Language Matters Most When Buying Complex or Expensive Things
Source: Common Sense Advisory, Inc.

- **Big-ticket purchases.** Here we asked about consumer electronics including digital cameras, mobile phones, PDAs, MP3 players, photo-printers, televisions, video and DVD players, radios; computing equipment such as personal computers, laptops, scanners, home networking equipment, photocopiers, heavy-duty printers; automotive products like cars, trucks, trailers, vans, motorcycles, boats; and white goods or major appliances for the kitchen or laundry such as stoves, refrigerators, washers, and dryers.

Response: Worldwide 68.8 percent of our sample attached importance to information in their own language. When we broke out the no-or-low proficiency group, the number jumped to 78.7 percent. Having content in their own tongue was a factor for 64.8 percent of those competent in English.

- **Food, personal care, and household items.** This group of products included groceries (food and beverages); clothing; pharmaceutical, beauty, cosmetic, and hair-care products; household electrical products such as kettles, toasters, hair dryers, fans; and sports and exercise equipment.

  Response: Across our eight-nation sample, 58.4 percent said that in-language communication was important to their purchase. For those with no-or-low proficiency in English, 66.7 percent told us that having information in their own language was important or very important to their purchase. For those more confident of their English-language skills, the percentage of those favoring their own lingo dropped to just over half (52.5%).

- **Commodities and low-cost items.** We queried our respondents about their online purchases of physical media such as books, magazines, DVDs, and CDs; digital downloads like MP3s, films, and audio books; and computer consumables such as print cartridges, paper, and data storage products.

  Response: Almost six out of ten (59.3%) of our worldwide sample said that their own language was important in buying commodity goods. When we consider only the non-English-speaking segment, the number climbs to 71 percent. However, just 40.2 percent of the English cognoscenti said that in-language information was important to their purchase decision.

We conclude that having marketing, selling, usage, and support materials in the local language is a critical factor in purchase decisions in all categories and most markedly so for financial, travel, and other services with complicated terms and conditions. Predictably, buyers stick to their own language when buying high-cost items such as computers much more than for commodities like printer ink. However, they cite the importance of language even when buying commodities.

International Buyers Express Their Language Preferences

Using a four-point scale, we asked whether respondents "disagree strongly," "disagree," "agree," or "agree strongly" with several statements regarding language-related purchasing issues.

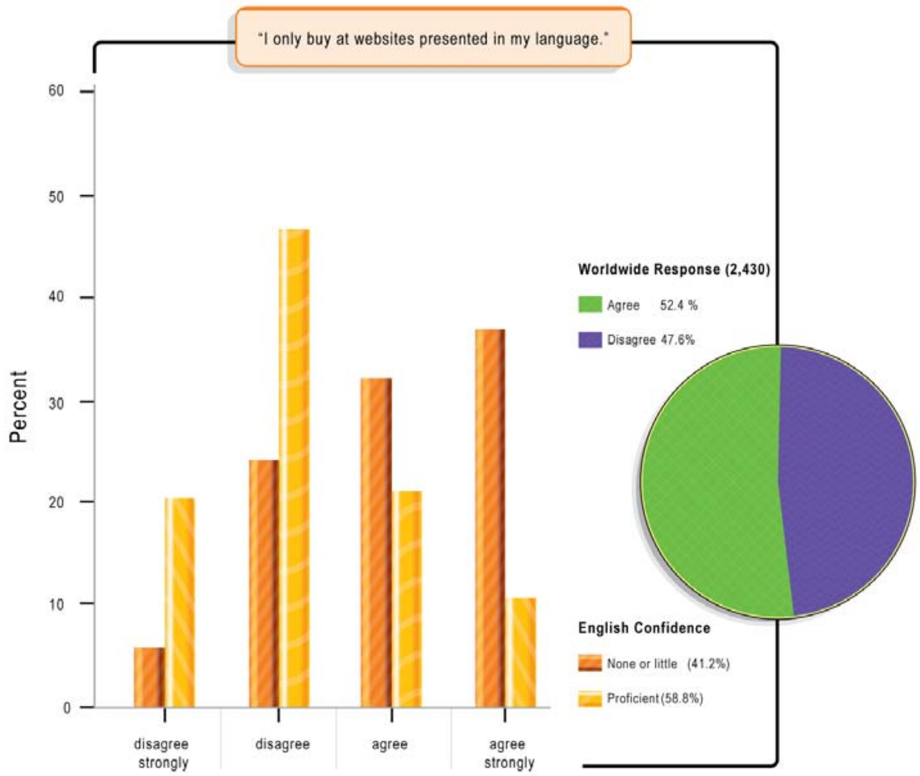

Figure 8: Non-Anglophone Visitors Most Likely to Buy at Sites in Own Language
Source: Common Sense Advisory, Inc.

International Buyers Almost Evenly Split on Home-Language Purchases

Our first proposition to our eight-nation panel about preferences and motivators was that "I only buy at websites presented in my own language" (see Figure 8). Our respondents split nearly 50-50 on this one (48.6% agreed, 52.4% disagreed). Factoring in language competence, we found that nearly 70 percent of the no-or-low English group agreed or strongly agreed with this statement versus just 32.1 percent for the proficient group.

However, when we focused on nationality as a determinant, we discovered that roughly two-thirds of the French (66.5%) and Japanese (65.6%) favored shopping exclusively at commerce sites in their language (see Figure 9). Of those more open to buying in other languages, the Spaniards led the charge with 63.9 percent willing to shop in English, closely followed by the Brazilians (63.8%) and Turks (61.3%). The lesson: If you want to sell your products to other nationalities using English, target these three countries. If the French show on your list of desirable buyers, it's time to hire a language service provider to translate website, marketing, and product content.[6]

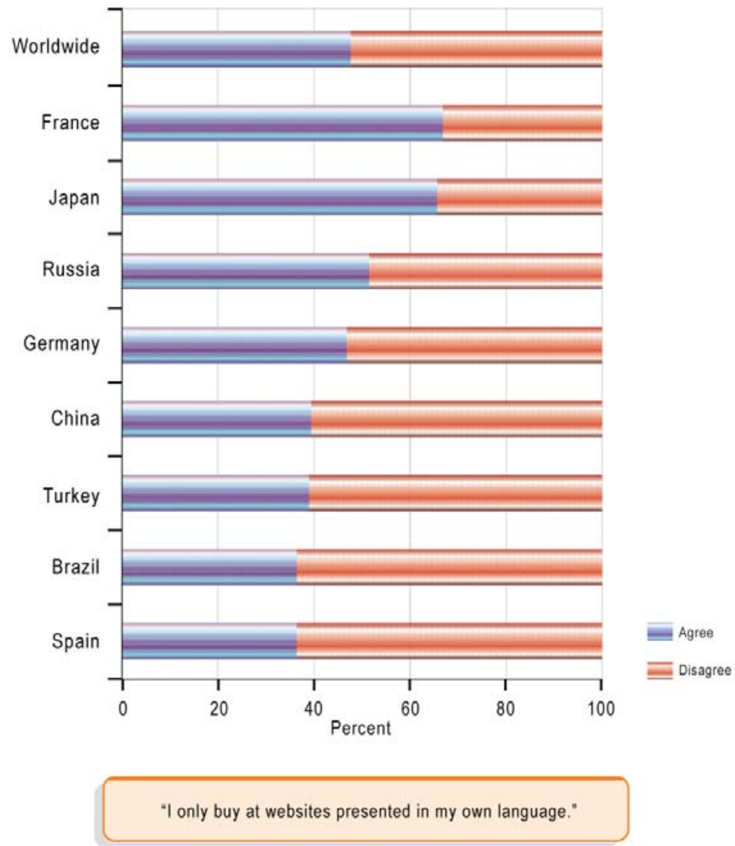

Figure 9: Most French and Japanese Consumers Buy Only in Their Language
Source: Common Sense Advisory, Inc.

Most Consumers Feel Discomfort in Other Languages, But May Still Buy

We then got more granular in our statements, asking how at ease they felt buying products represented in other languages – "I am comfortable deciding which products to buy even if the information is not in my language" (see Figure 10). Nearly six out of ten (59.4%) of our total sample of 2,430 consumers agreed or strongly agreed with this statement, but the percentages flipped when we factored in language proficiency – 56.9 percent of respondents with no or little confidence told us that they did not feel comfortable.

For this group, their knowledge of a foreign language was not up to the task of a purchase decision, making them hesitate when it came to hitting the "buy now" button. When we asked those who were surer of their English, we found that 72.4 percent felt comfortable enough to buy in other languages, though they may do so on rare occasions. In future research we will drill down into this data, cross-tabulating it with their actual buying performance for the four product categories discussed above.

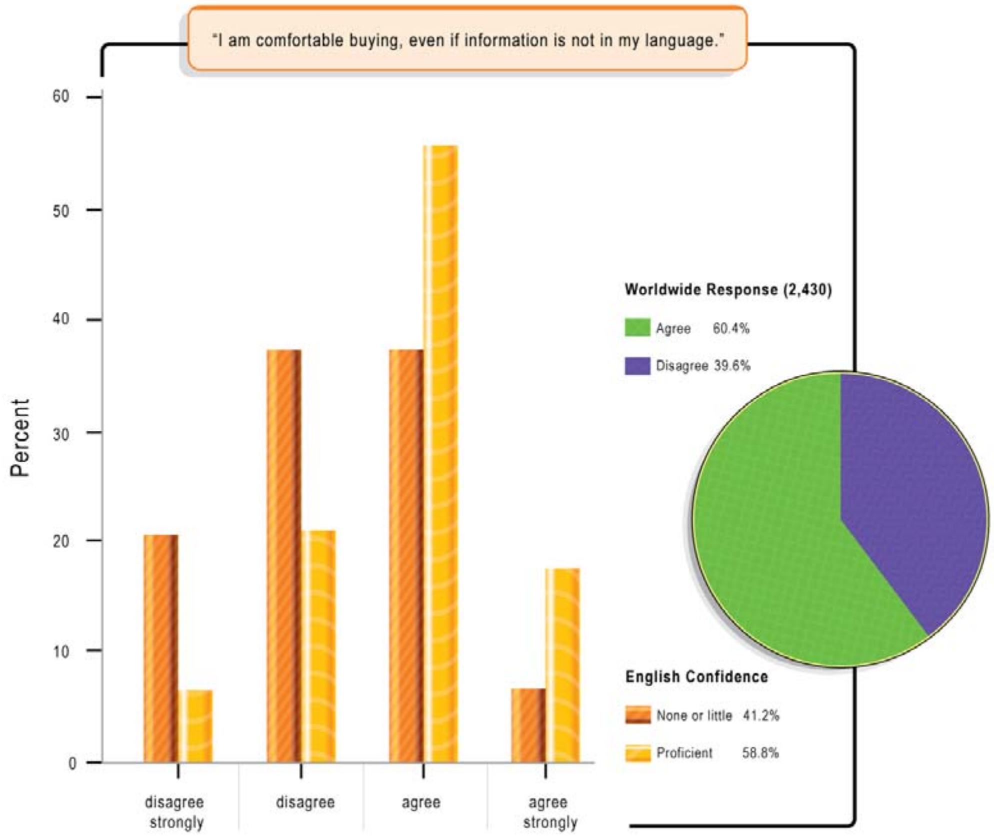

Figure 10: Actual Buying Behavior Aside, Some Are Comfortable in English
Source: Common Sense Advisory, Inc.

All Other Things Being Equal, Consumers Prefer Buying in Their Language

Next we presented our survey respondents with an A-B split: "When faced with the choice of buying two similar products, I am more likely to purchase the one that has product information in my own language" (see Figure 11). Nearly three out of four participants (72.4%) agreed with this statement, favoring their own language in this *ceteris paribus* comparison. The no-or-low English group was 4.8 times more likely to buy products offered and documented in their own language (82.5% agreed), while just 65.5 percent of the English-proficient respondents said they favored local-language products.[7]

Recognizing that price often enters the buying equation, we proposed that "when faced with the choice of buying two similar products, I am more likely to purchase the one that is less expensive even if it does not have product information in my own language." In the total sample, 43.8 percent would opt for the cheaper product over the one with their language (see Figure 12). However, 64.3 percent of the no-or-low English group would pay more for

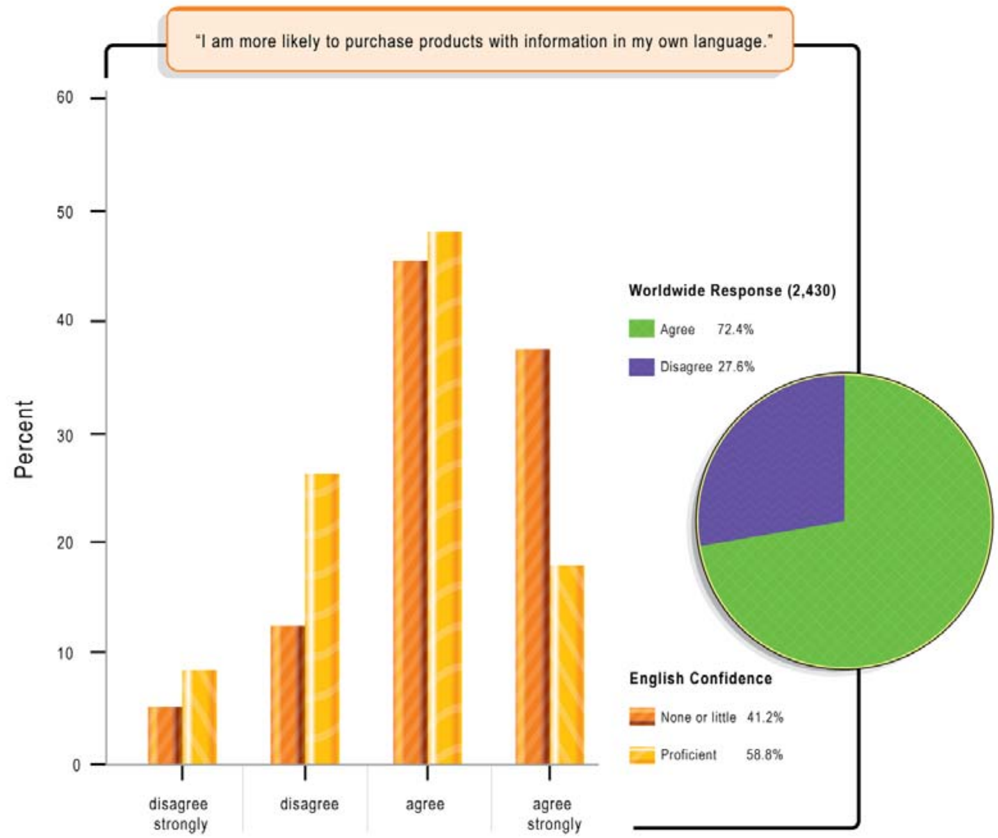

Figure 11: Most Consumers Prefer Products in their Own Language
Source: Common Sense Advisory, Inc.

information they could read in their own language. Those with English proficiency were split nearly 50/50 on this proposition.

When we considered this question vis-à-vis nationality, we found that the Chinese (50.3%) and French (50.2%) led the pack of value shoppers, both opting for the lower-priced product. Just one third of Brazilians (33.3%) and Russians (31.2%) agreed with this proposition, indicating a more adamant stance of having materials presented in their language rather than paying a lower price.

Thus, we conclude that most people will pay more for products with information in their own language. As we saw earlier, the demand for local-language products was higher when we asked "when faced with the choice of buying two similar products, I am more likely to purchase the one that has product information in my own language over a less expensive one that does not." Again, this reinforces the idea that commodity items with competitive products will not do well vying for the affection of non-Anglophone buyers – even if they are price leaders. But brand does factor into this equation, as we will see shortly.

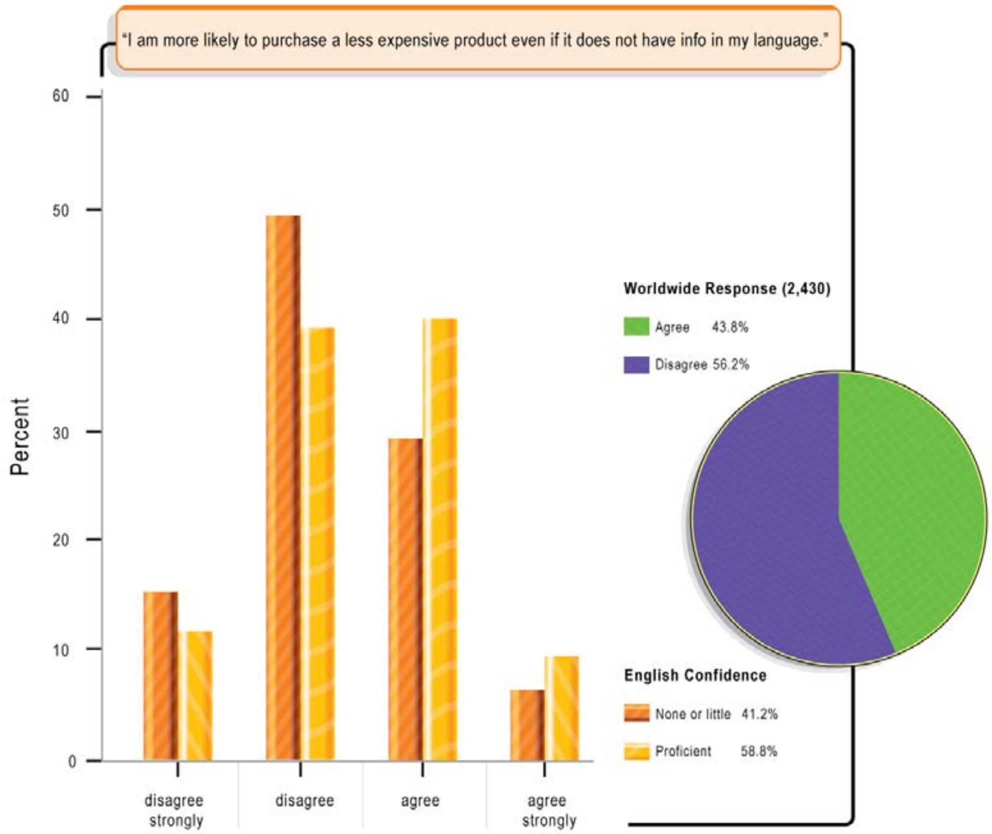

Figure 12: Most Buyers Will Pay More for Their Own Language
Source: Common Sense Advisory, Inc.

Mother Tongue Content Becomes More Important over Product Life Cycle

Switching gears, we gauged our respondents' need for local-language support at two points in the product life cycle – when they first buy it and when they seek post-sales service (see Figure 13).

- **Translated documentation matters less at the point of purchase.** We proposed that "I will only purchase something if the user guide or owner's manual is in my own language." Less than half (45.5%) of our total sample agreed that local-language documentation was not that critical at this early stage of a customer's relationship with a supplier. Whereas 65.1 percent of those with no or low English said that language matters, just 31.8 percent of the English-proficient group were insistent on the language issue.

- **But post-sales support needs to be in-language.** Three out of four respondents (74.7%) agreed that "I am more likely to purchase the same brand again if the after-sales care is in my own language." The numbers

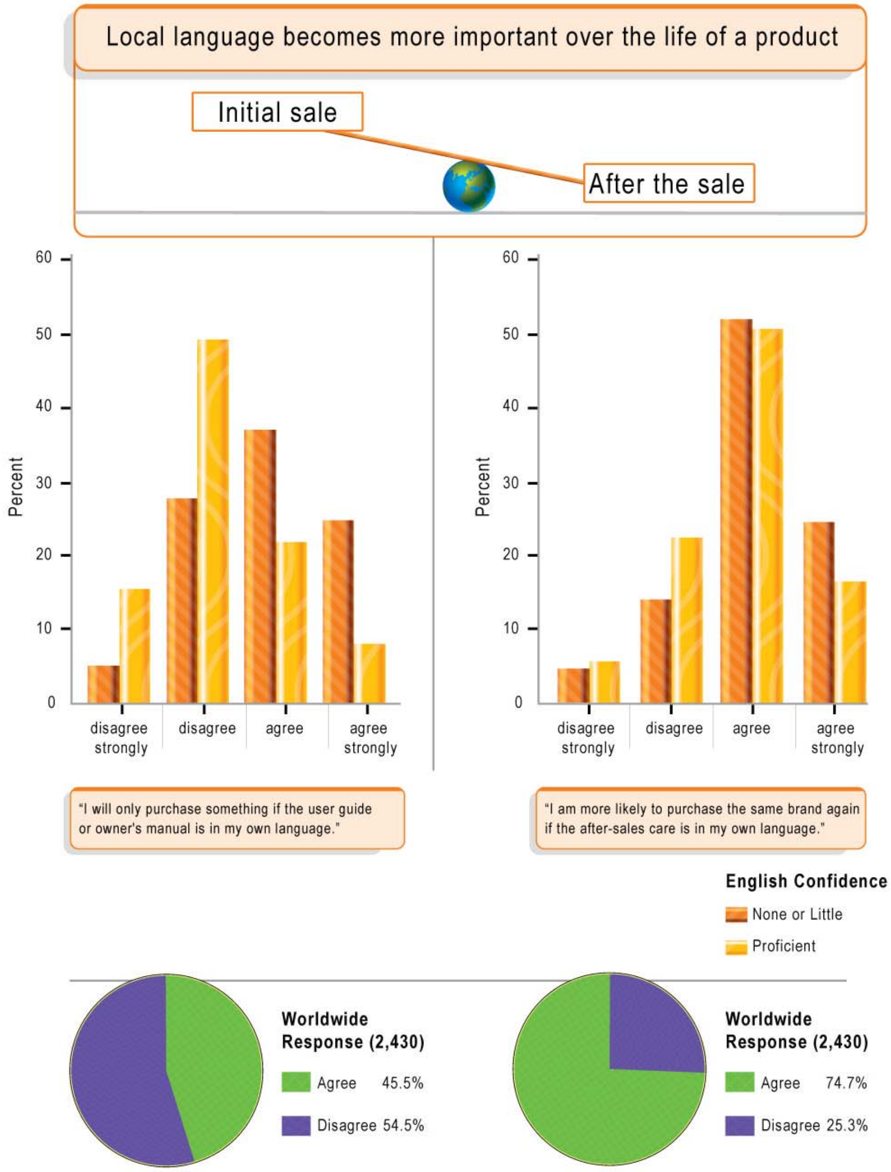

Figure 13: Language Becomes More of an Issue When Buyers Need Help
Source: Common Sense Advisory, Inc.

jumped to 80.6 percent of the no-or-low group, with 70.6 percent of the English speakers agreeing on the need for in-language product support.[8]

The lesson to online marketers is that language comprises a key element in building a long-term relationship with a customer. While consumers might find immediate gratification in the availability of a product documented in a language other than their own, they will be more interested over the long term in accessing

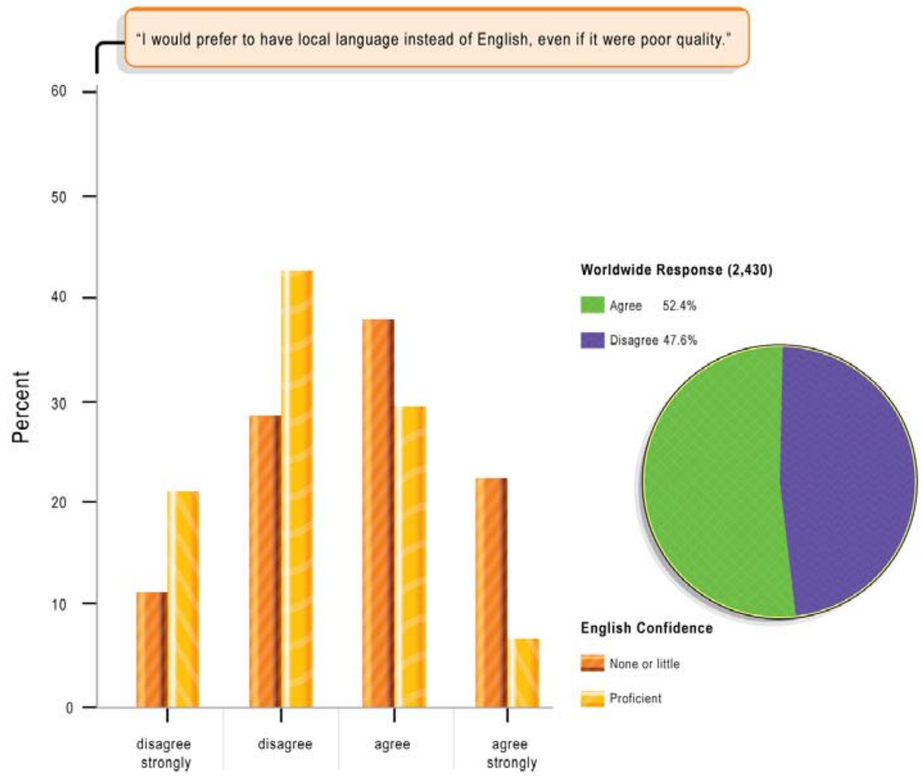

Figure 14: Bad Translations Are Better than No Translations
Source: Common Sense Advisory, Inc.

support materials that they can understand. If you don't support buyers in their own language, you may not get a repeat customer. This fact is especially important for products and services where the lifetime customer value is higher than the return on that first sale. Conversely, this dynamic also provides at least one argument against translation for products that people buy just once, where lifetime value doesn't enter the picture.

How about translating content, but doing it poorly? Forty-five percent of the 2,430 respondents agreed that "I would prefer to have local-language content instead of English even if it's poor quality" (see Figure 14). Not surprisingly, 60.3 percent of the low-or-no English respondents agreed with this statement, preferring any local language to none – they were 2.7 times more likely than those competent in English to favor low-quality translation over English. In general, any local-language content is better than "zero translation."[9]

Once we factored in nationality, more than half of the French (75.4%), Germans, (65.4%), Japanese (57.4%), and Russians (51.0%) told us they preferred a bad translation over having no product information in their language (see Figure 15).

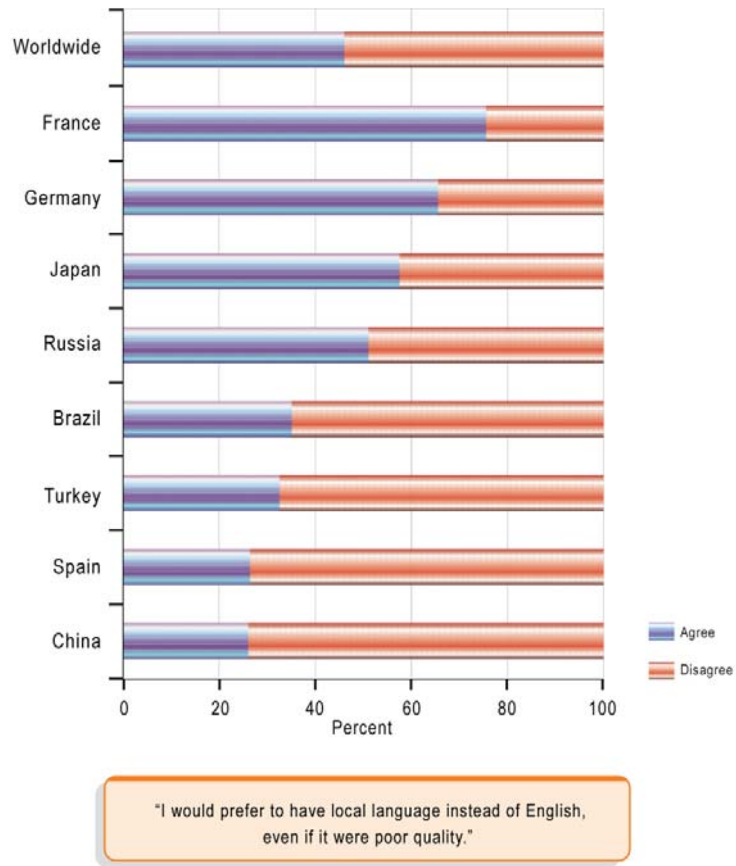

Figure 15: Some Nationalities Tolerate Bad Translations More than Others
Source: Common Sense Advisory, Inc.

The lesson: A cheap, "quick and dirty" translation may be enough to get your product or service considered. As competition increases and consumers have access to more options, low-quality translation will not suffice.

More than Half of All Visitors Sometimes Turn to Machine Translation

The question of bad translation led us naturally to the acceptability of automated or online machine translation (OLMT), freely available through a variety of websites. We asked "how often do you use automated machine translation such as BabelFish, Google, or Systran to better understand the English you read at a website." As a whole, 53.5 percent of our respondents said they use MT: sometimes (35.0%), frequently (15.5%), and always (3.0%).

When we cut the data according to language proficiency, usage described a bell curve for both no-or-low and proficient users (see Figure 16): "Always" was a scant 5.0 percent and 1.6 percent, respectively; "frequently" scored 20.2 and 12.2

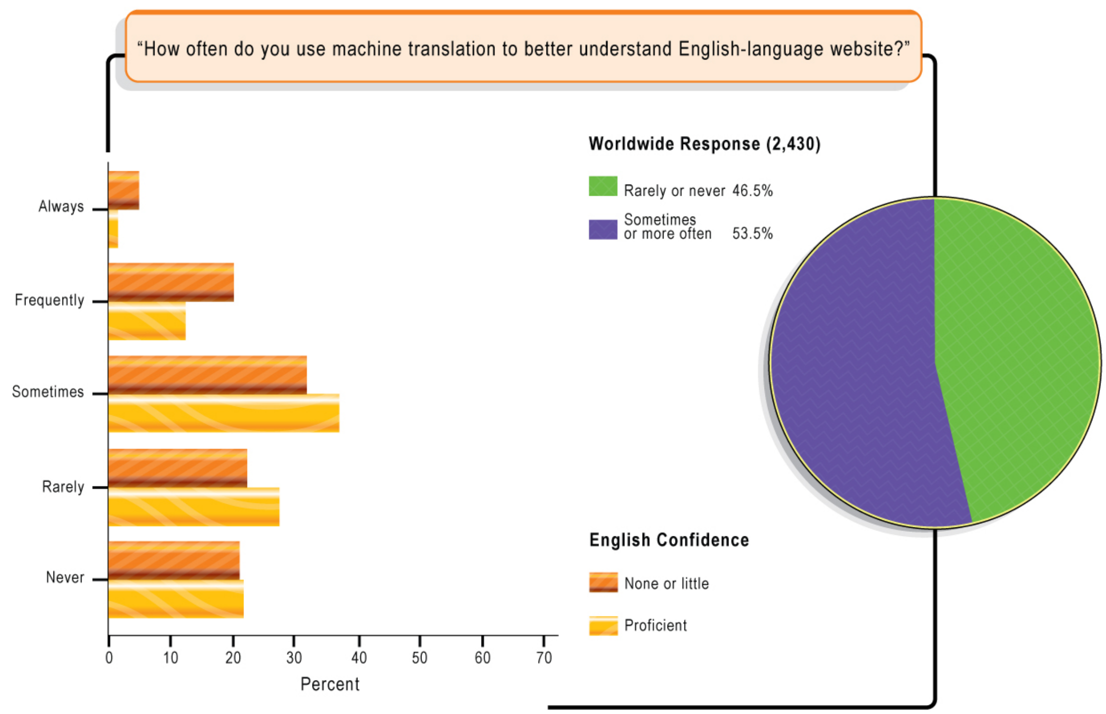

Figure 16: Most Visitors Use Online Machine Translation Sometimes
Source: Common Sense Advisory, Inc.

percent; "sometimes" was the biggest, coming in at 31.5 and 37.4 percent; "rarely" was 22 and 27.2 percent, and "never" was chosen by 21.4 percent of the no-or-low segment and 21.6 percent of those with English competency.

Since so many foreign visitors turn to machine translation anyway to figure things out, we always recommend that companies with insufficient budget for translation offer a button for machine translation – and monitor the requests so you know what content receives sufficient interest to justify human translation. This automation plus monitoring option gives foreign-language visitors a choice between the de facto zero translation and the imperfect machine translation they will use anyway.

We also find that this data maps intriguingly to the relative quality of available machine engines (with Spain being an exception). For French and German, low quality is *less low* than for Turkish, Chinese, and Brazilian Portuguese. Japanese users are more acclimatized to computer-translated output, having relied on it for many years for online browsing. The fact that MT provides at least enough useful output to increase user adoption should be good news to the developers who have worked on this problem for more than 50 years.

It is not advisable to publish pre-translated output from MT (without editing and review). Instead, provide a button that allows your visitors to perform this task for themselves, quickly and easily. This simple device protects your brand from the vagaries of machine output. If you do it for them, they naturally assume you have read and approved the possibly offensive gobbledygook they are reading.

Brand Trumps Language, But Language Beats a Lower Price

We asked our respondents to look beyond language issues to bigger marketing concerns such as brand. We proposed that "I would purchase a global brand with a good reputation without product information in my own language in preference to a little-known brand that does provide product information in my language." Nearly 61 percent of all respondents agreed with that statement.

Among the no-or-low English respondents, 55.9 percent agreed or strongly agreed that they valued a global brand more than language. For those able to deal with English, 64.1 percent attached more worth to the global brand than to the lesser known but in-language brand. Interestingly, those who were on the no-or-low English side of the equation were 1.4 times more likely to be seduced by the glitter of a global brand.

We considered their answers in the context of two earlier questions: 1) all other things being equal, they preferred the local-language variant of two similar products (Figure 11); and 2) most people would pay more for a product documented in their language (Figure 12). We conclude that our international consumers value a global brand over language, and they see local language as more important than price (see Figure 17).

Brand even trumps language in some countries that we didn't expect, based on other results (see Figure 18). For example, roughly three-fifths of French (60%) and Russian (61.2%) consumers buy brand over language. On the other hand, Germans (47.5%) and Japanese (48.2%) were less entranced by global brands.

For companies like Apple, Nokia, Sony, and Toyota – all replete with global brands and the wherewithal to keep investing in them – this is good news. Brand can provide cover for a certain amount of non-existent or laissez faire localization. In a category or market with little or no competition, a global brand can carry a product with minimal local content, even more so if that product can be used without opening an instruction manual or calling customer support.

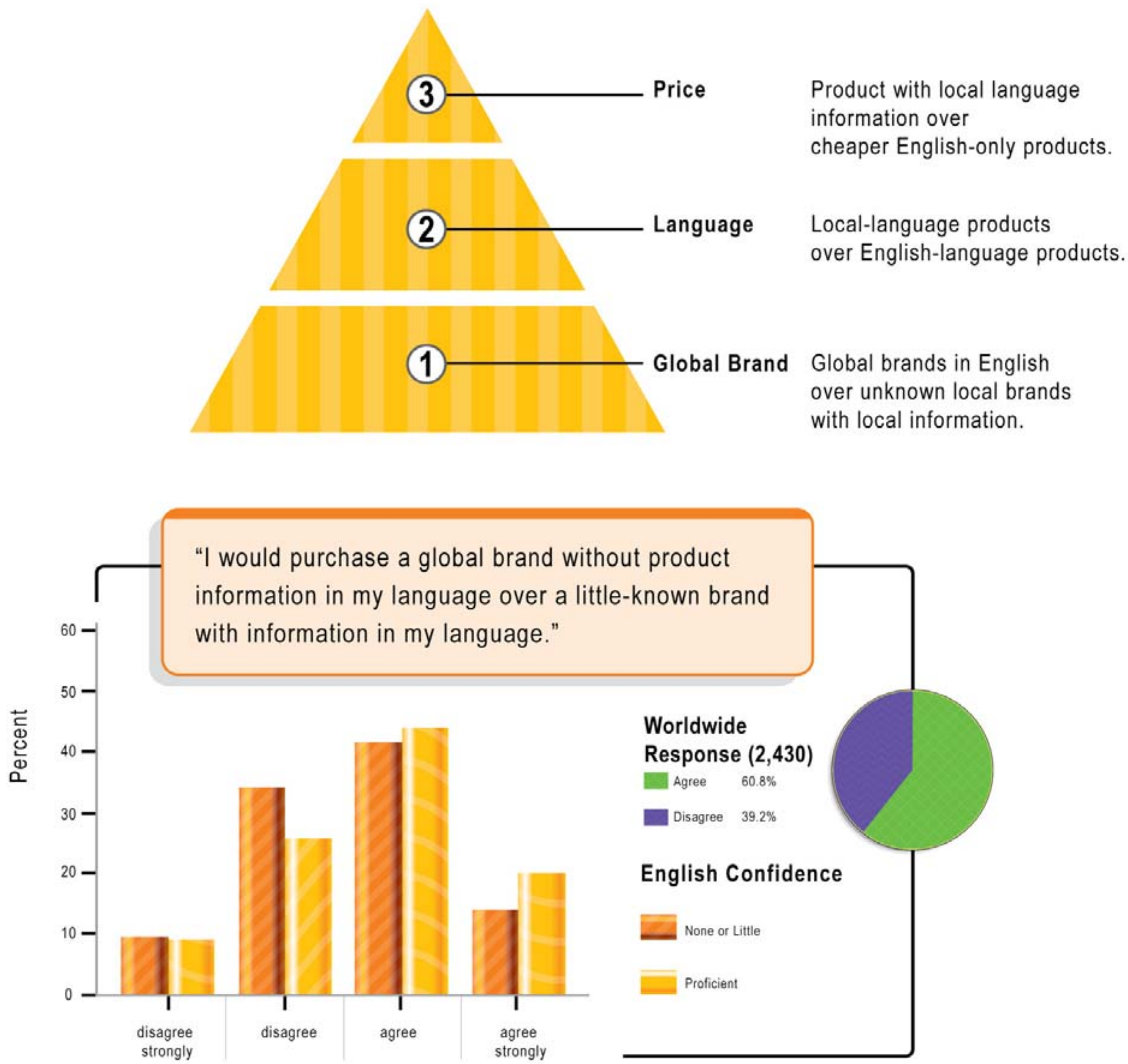

Figure 17: A Global Brand Trumps Language and Price
Source: Common Sense Advisory, Inc.

However, the preeminence of brand constitutes decidedly bad news for any company with a lesser known mark as it tries to market to international audiences. Without the power of a globally recognized name, companies just starting out on their international journeys will have a tougher sell establishing their value proposition. The lesson: Language looks like a better way to counter that disadvantage than cutting the price.

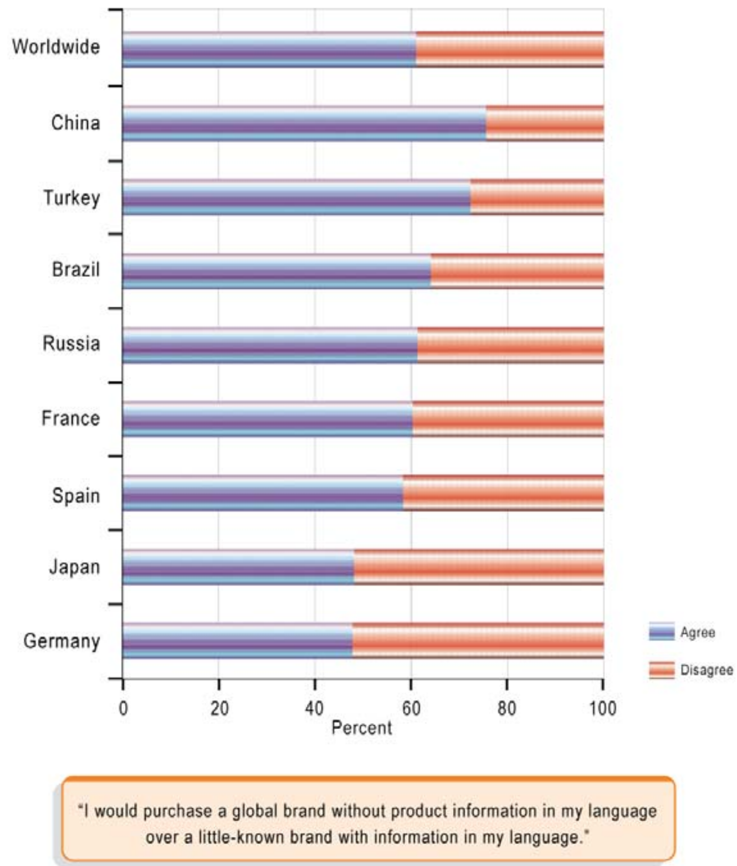

Figure 18: Perceived Value of a Global Brand Varies by Nationality
Source: Common Sense Advisory, Inc.

Why Foreign Visitors Abandon Websites

Marketing executives and web designers spend lots of time worrying about why, when, and where visitors leave their websites. Based on the understanding of language preferences we achieved from our eight-country sample, we wondered what made international visitors leave websites. We asked our respondents to rank eight commonly cited reasons for leaving a website. We categorized the reasons for leaving across the buying experience as visitors transitioned from casual visitor to browser to shopper to buyer to customer (see Figure 19):

- **The uncommitted can bail out at any time.** Sites can make only one first impression. First-time visitors review the look and feel of the site, sense the performance as they browse, and decide whether or not to spend more time there. Some exit immediately, driven away by slow page loads, unclear navigation cues, or by the site’s constant reversion to English.

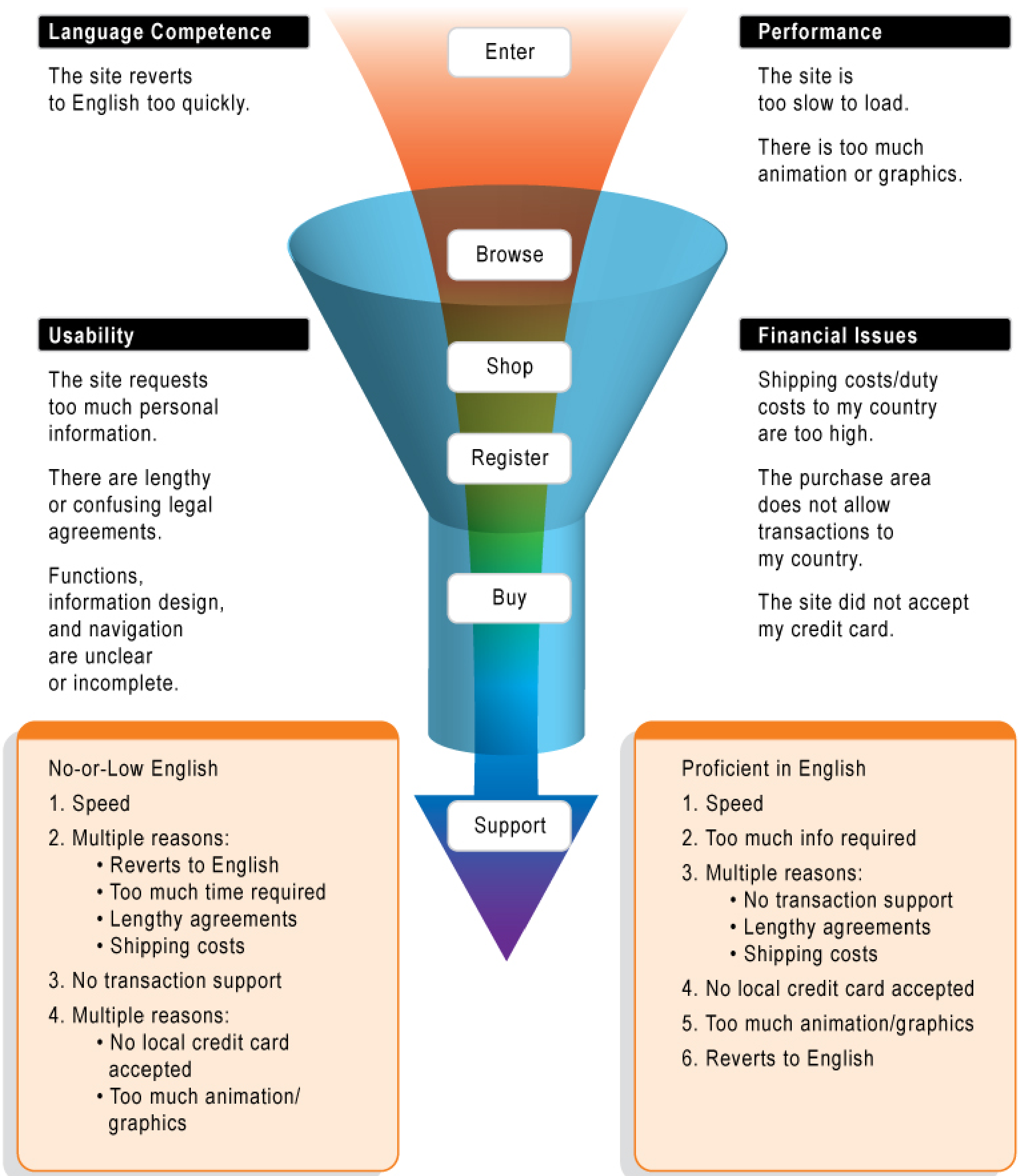

Figure 19: People Leave Websites for More than Language Issues
Source: Common Sense Advisory, Inc.

- **Driven by desire or need, searching and shopping begin.** Actively browsing the site, visitors search for something they want to buy. At this stage, they might find an item and check pricing, availability, shipping charges, and maybe even customs terms if they are savvy international shoppers. Some may find the cost too high and leave. Others may find that their English-language skills – adequate or "fairly good" up to this point – are not up to the task of reading lengthy, complex legal disclaimers.

- **Buying adds a "localization" concern to navigation and forms.** Visitors who decide to buy must provide personal details and payment information. They may find that data forms on the site haven't been adapted to their country, so they cannot enter phone or postal code data. Some of the logical structure or functions of the English-language site are missing or not translated. They might discover after filling out a form that the site won't accept their credit cards or ship to their country. Once you pass that hurdle, you can begin building a lifetime relationship with your new customer.

So how does all this translate into buying behaviors? People peel off at different stages based on their language confidence. We did find some commonality among all visitors, regardless of their comfort level with English – the need for speed. "The site is slow to load" outscored all other choices for both groups.

- **Language and pre-commerce issues drive away low-or-no English visitors.** A quick reversion to English, lengthy agreements to read, requirements to provide too much information, and the prospect of paying hefty shipping costs were secondary reasons for them to leave. Next up on their list of site turnoffs was the absence of transaction support for their country, followed by the inability of the site to accept local credit cards. Finally, too much animation and graphics diverted their attention from the purchase at hand.

- **Commerce issues send English-proficient users away.** The demand for too much information followed slow-to-load as the most cited reason for leaving a site, a reflection of registration and pre-purchase data collection forms. Then the lack of transaction support for their country, lengthy agreements, and shipping costs sent them on their way. If they managed to get past those pre-purchase hurdles, the site's inability to accept their credit derailed their purchases. Finally, animation and graphics, along with a reversion to English, trailed their reasons for leaving a site.

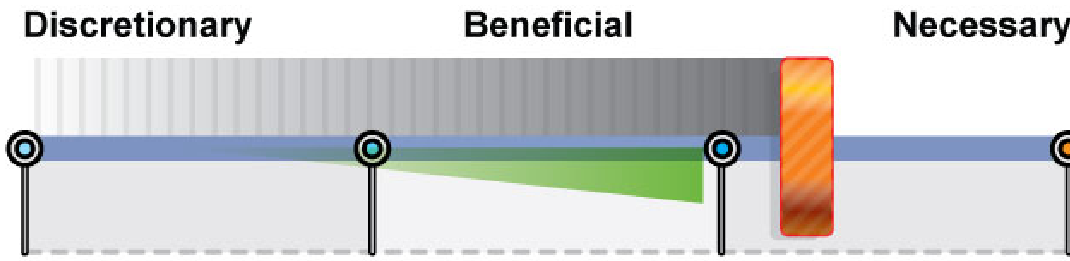

Figure 20: Necessity Drives Purchases from English-Language Websites
Source: Common Sense Advisory, Inc.

On the Global Web, Language and Localization Matter More Than Ever

Language of any quality draws prospects into the web sales funnel. More complete information in your prospects' language will keep them actively browsing. Once they choose to buy, a successful global website will offer properly adapted forms, transactions, and logistics. A localized experience increases the likelihood of a browser becoming a buyer – and of a buyer progressing to repeat customer.

The challenge to any international marketer is to drive foreign prospects to the purchase, regardless of where they are on the continuum (see Figure 20). For a discretionary purchase, an offer might not warrant slogging through a site in an unintelligible language. If a visitor sees some benefit to buying, a consumer may tolerate some discomfort to achieve an anticipated gain or useful product. When a product is essential, people will find the product or service and buy that necessary item, even if it means going to an English-only site – as long as the site allows visitors from that country to complete their transactions. Companies selling unique products, having few competitors, and satisfying a demonstrable need will do better internationally with an English-only site versus a company selling commodities with local competition.

Soap magnate Lord Lever said he could tell that half of his advertising budget was working. The problem was, he didn't know which half. Firms investing in English-only sites should have no trouble seeing which half is not working – it's the part that assumes people in other countries will use English. In fact, nearly 60 percent of the total sample preferred having information in their own language. Regardless of what they're buying, language and localization matter.

About Common Sense Advisory

Common Sense Advisory, Inc. is an independent research firm committed to objective research and analysis of the business practices, services, and technology for translation and localization. With its buy-side research, Common Sense Advisory endeavors to improve the quality and practice of international business, and the efficiency of the online and offline operations that support it.

About Our Data Collection Underwriters

Due to the complexity of collecting data from consumer panels around the world, we engaged a global consumer panel firm to poll its panelists with our eight in-language surveys. Wordbank, Lionbridge, and Idiom underwrote the data collection effort but they did not participate in the selection of panelists or in the analysis of the data we collected.

---

[1] "Beggars at the Globalization Banquet" by Donald A. DePalma and Renato S. Beninatto (Common Sense Advisory, Inc., November 2002).

[2] "Strategies for Global Sites" by Donald A. DePalma et al. (Forrester Research, May 1998).

[3] "Are you talkin' to me? An International Market Study into the Impact of Language on a Consumer's Purchasing Behaviour" (Wordbank, July 2005).

[4] "Design Practices for Global Gateways" by Donald A. DePalma and Renato S. Beninatto (Common Sense Advisory, Inc., September 2003).

[5] "Business Without Borders: A Strategic Guide to Global Marketing" by Donald A. DePalma (John Wiley & Sons, Inc., 2002).

[6] "How to Avoid Getting Lost in Translation" by Donald A. DePalma and Renato S. Beninatto (Common Sense Advisory, Inc., December 2003).

[7] "Developing Products for Global Markets" by Donald A. DePalma (Common Sense Advisory, Inc., June 2006).

[8] "Corporate E-Mail Disconnect" by Donald A. DePalma (Common Sense Advisory, Inc., July 2004).

[9] "Beyond Global Websites" by Donald A. DePalma et al. (Lowell, MA: Common Sense Advisory, Inc., March 2005).