



## International Survey of Global Buying Preferences

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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. 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.

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. Before our full report “Can’t Read, Won’t Buy: Why Language Matters on Global Websites” on the subject of global buying preferences became available, there had been no large-scale behavioral study of consumers to validate either argument. 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 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 the “Can’t Read, Won’t Buy” global dataset will focus on the individual countries, probe drill-down questions into particular behaviors, and analyze 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- or natal-language sites.