The native language effect:
What stands between building trust and blocking growth
Survey Overview

**Date fielded:** August 26, 2021

**Regions surveyed:** US, UK, France, Germany, Brazil, Japan

**Qualification Criteria:** Consumers who have purchased a product or service in the last 12 months

TOTAL NUMBER OF RESPONDENTS

2,754
Audience Breakdown

**Total Respondent**: 2,745

- **US**: 403
- **UK**: 416
- **Germany**: 415
- **France**: 539
- **Japan**: 405
- **Brazil**: 576

- **20%**: Gen Z
- **53%**: Millennial
- **15%**: Gen X
- **12%**: Boomers
Top findings

2 in 3 global consumers believe it’s extremely or very important that brands offer an end-to-end customer experience in their native language.

2 in 3 global consumers would switch to a different brand that offers support in their native language.

1 in 5 global consumers say empathy is a mark of excellent customer service.

1 in 3 global consumers cite lack of multilingual experiences, lack of representation, and lack of diversity and inclusion as their top concerns in localized customer experiences.
ROI of Native Language

Why global brands should offer multilingual customer experiences
The multilingual opportunity

- **47%** of products our respondents purchase are from brands that are not native to their country.
- **69%** of the global consumers we surveyed believe it's extremely/very important that brands offer an end-to-end customer experience in their native language.
- **71%** of respondents believe it's extremely/very important that a brand promotes and supports their products and services in their native language.
- **Fewer than 50%** of brands offer any kind of multilingual customer experience, according to consumers surveyed.
What’s at stake

Brand reputation
57%
of global consumers say it’s a bias when brands don’t offer end-to-end multilingual experiences to their customers.

The bottom line
64%
would pay a higher price for a product or service if a brand offers a customer experience in their native language.

The edge over competitors
74%
would switch to a new brand that markets products or services in their native language.

Consumers’ ability to relate with and purchase a brand’s product

- 48% find it easier to buy
- 44% better relate to the brand
- 29% feel it shows brand empathy
- 44% find it easier to understand the content
- 29% feel more confident when communicating with the brand
- 26% find it more relevant

The bottom line

64%

Brand reputation

57%

The edge over competitors

74%
Where brands must be fluent (global)

- 34% Social Media
- 22% Messenger Apps
- 21% Website forms
- 50% Email
- 26% Chat
- 10% Chatbots
- 10% Video
- 38% Phone
- 35% In-store
- 1% Other
Top channels (by region)

**JAPAN**
- Email: 54%
- Phone: 43%
- Website Forms: 34%

**FRANCE**
- In-Store: 46%
- Phone: 45%
- Social Media: 40%

**GERMANY**
- Email: 57%
- In-Store: 41%
- Phone: 40%

**BRAZIL**
- Email: 49%
- Social Media: 48%
- Messenger Apps: 43%

**UK**
- Email: 59%
- Phone: 34%
- Social Media: 31%

**US**
- Email: 51%
- Phone: 41%
- In-Store: 34%
Top channels (by generation)

**GEN Z**
- Social Media: 46%
- Phone: 39%
- In-Store: 36%

**MILLENNIALS**
- Email: 51%
- Phone: 37%
- Social Media: 36%

**GEN X**
- Email: 59%
- In-Store: 39%
- Phone: 38%

**BOOMERS**
- Email: 64%
- Phone: 44%
- In-Store: 42%
Industries that are getting it right

- **20%** Automotive
- **42%** Travel & Hospitality
- **31%** Retail
- **26%** Consumer goods
- **31%** Gaming
- **38%** Tech
- **21%** Financial Services
- **28%** Healthcare & Pharmaceuticals
- **2%** Other
The Impact of Excellent Multilingual Customer Service

The link between native-language support and customer loyalty
It all translates into loyalty

- **Native-language customer support has a definite impact on customer loyalty.** 73% of our respondents would be loyal to a brand that offers support in their native language.

- **Consumers are willing to leave brands that don’t offer native-language customer service.** 68% of consumers would switch to a different brand that offers support in their native language.

- **Consumers are able to put a monetary value on the loss businesses could face if they don’t provide multilingual support.** 1 in 4 US consumers say they will not spend more than $500 on these brands.
Poor native-language service: as much a liability as no multilingual support

- **Even in the limited multilingual experiences customers get from global brands, there are issues with poor customer service.** 57% admit that they’ve had at least one negative brand experience with customer service in their native language.

- **It’s not just enough to offer multilingual support: It has to be high-quality to retain loyal customers.** 92% of global consumers believe that poor customer service, even if it is in their native language, will impact their trust and loyalty toward a brand.
Bonus advantage of multilingual support: increased customer tolerance

- Nearly 40% of global consumers are very likely or likely to overlook poor customer service if it’s offered in their native language.

- However, consumers won’t look away for long: Almost two-thirds (62%) of consumers are willing to overlook up to three instances of poor customer service from a brand. But 1 in 4 consumers (27%) will completely stop buying from a brand after the first negative experience.

- **The key takeaway:** Some kind of multilingual customer service is still better than no native-language support, but only as long as the brand keeps progressing toward higher quality.
What counts as high quality

We asked global consumers what their top three priorities are when it comes to native-language customer support. A majority of our respondents chose the following.

- 47% Quick Response Times
- 46% Fast Resolution Times
- 40% High Quality
- 35% Human Interaction
# Top priorities in multilingual customer service (by region)

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<th>Region</th>
<th>Quick Response Time</th>
<th>Fast Resolution Times</th>
<th>Human Interaction</th>
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Top priorities in multilingual customer service (by generation)

**Gen Z**
- 44% quick response time,
- 39% fast resolution time,
- 38% high-quality

**Millenials**
- 44% fast resolution times,
- 45% quick responses,
- 42% high quality

**Gen X**
- 53% quick response times,
- 48% fast resolution times,
- 39% human interaction

**Boomers**
- 58% faster resolution times,
- 52% quick response times,
- 41% human interaction
Missteps to avoid in multilingual customer service

Poor quality of translations leaves more than half of our respondents (52%) dissatisfied, but there are even more challenges that customers face when interacting with brands in their native language.

- **36%**
  - Lack of multilingual customer experiences

- **33%**
  - Lack of Representation

- **28%**
  - Lack of Diversity and Inclusion
How brands can improve

- **32%** More interaction with human native speakers
- **30%** More brands offering multilingual customer experiences
- **25%** Language support across more digital channels
- **24%** More automated support in my language
- **22%** More seamless multilingual experiences across channels
- **23%** More languages supported
- **19%** More localized content and visuals
- **22%** More diversity and inclusion

High-quality support in my native language