

THE UNBABEL GLOBAL MULTILINGUAL CX REPORT

2021

The native language effect

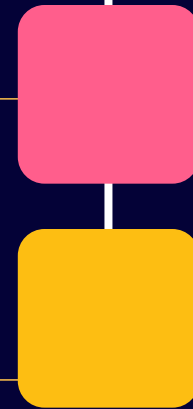
What stands between building trust and blocking growth

Welcome to the Unbabel Multilingual CX Report 2021

Unbabel started with the lofty goal of becoming the world's translation layer and empowering any business in any corner of the world to become a multinational corporation. **The Unbabel Multilingual Customer Experience Survey** is our attempt at understanding global consumers so we can help brands like yours better. This annual report highlights the expectations of consumers around the world when it comes to communicating with global brands.

We surveyed more than **2,750 consumers in six countries**: Brazil, France, Germany, UK, Japan, and the US. Some questions we sought to answer include:

- How important is it to reach audiences in their native language, with the local flavor?
- What impacts consumers' trust and loyalty toward a brand?
- How can brands attract customers in new markets as well as retain customers in this rapidly changing competitive environment?
- How do consumers define good native-language customer support?
- What's the overall effect of localized customer support on the bottom line?



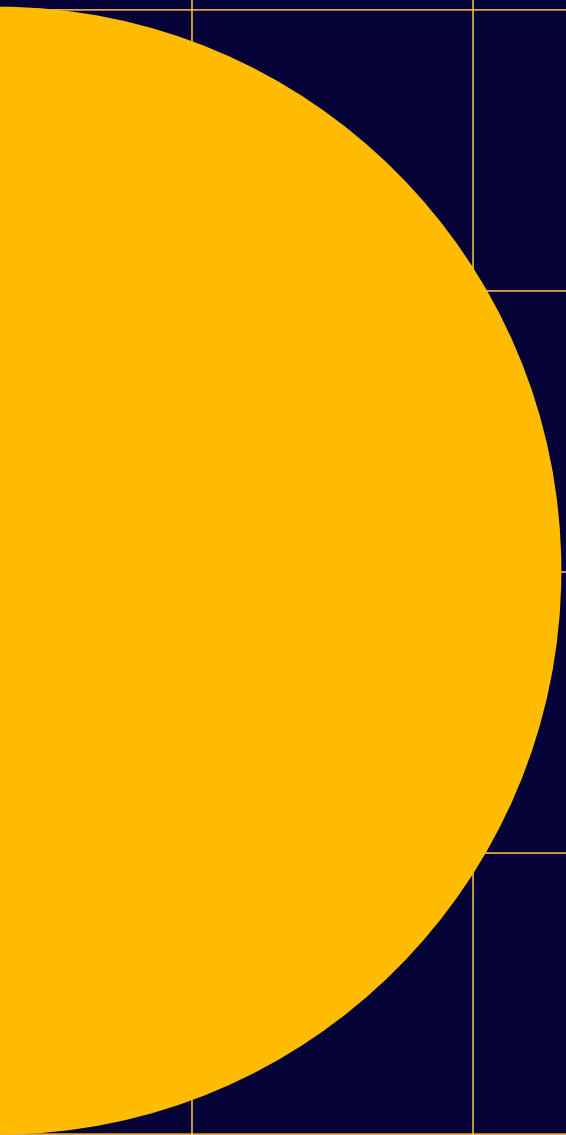


Table of contents

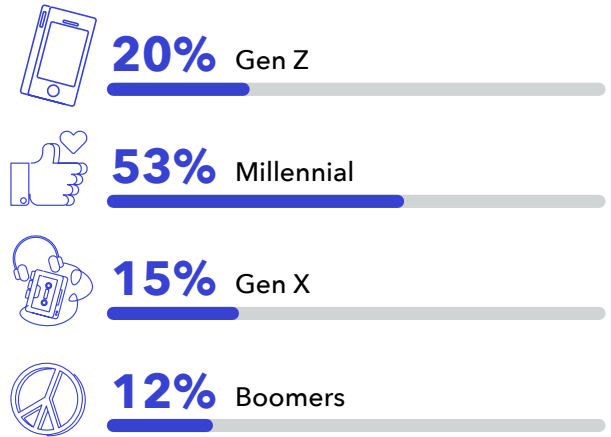
Introduction	04
Seizing the multilingual opportunity	06
Keeping the relationship alive, after the sale	19
Key takeaways & recommendations	29

Introduction

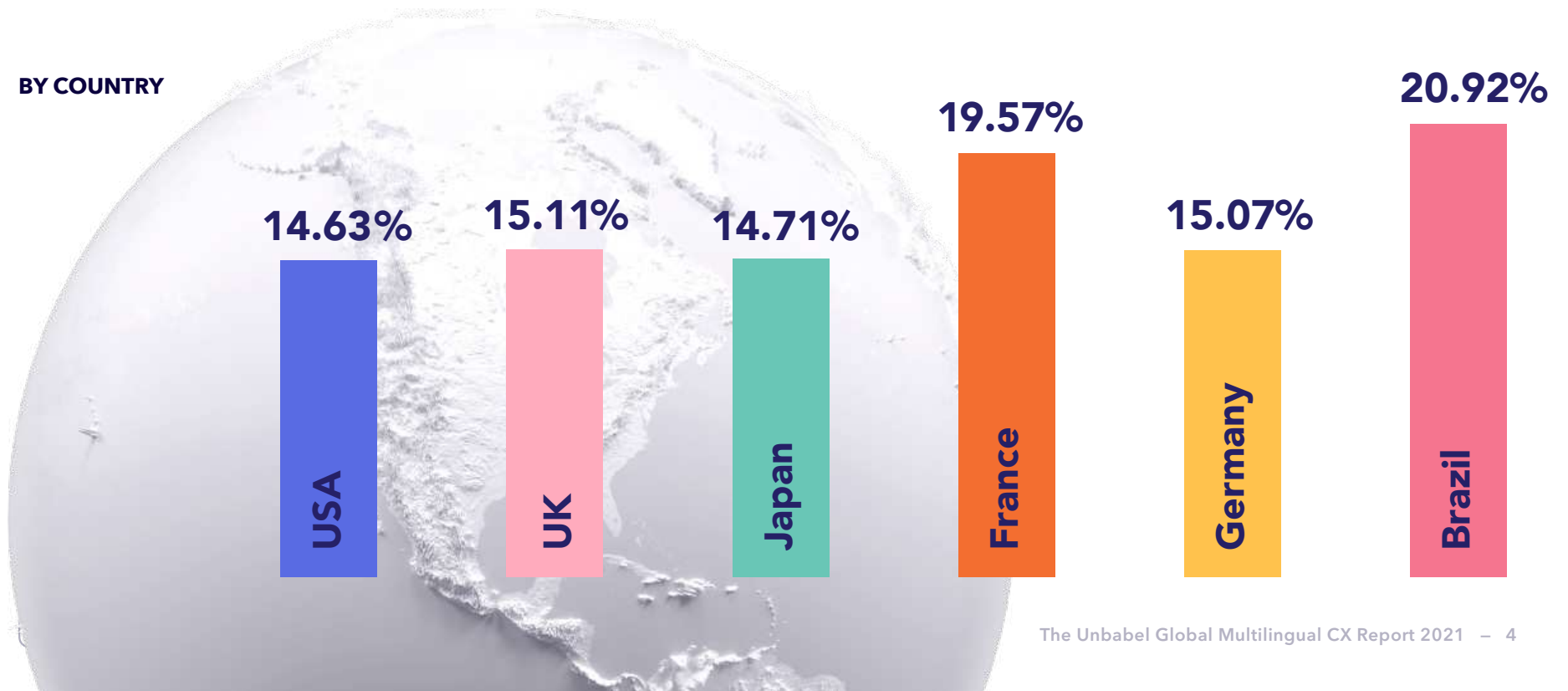
We surveyed **2,754** consumers around the world, from six major, diverse markets: France, Germany, Japan, UK, Brazil, and the US. We fielded the survey on August 26, 2021.

To better understand consumer behavior and mindset, we broke down the data not only by country but also by generation. For the sake of this survey, we categorized age groups into generational classes.

BY GENERATION



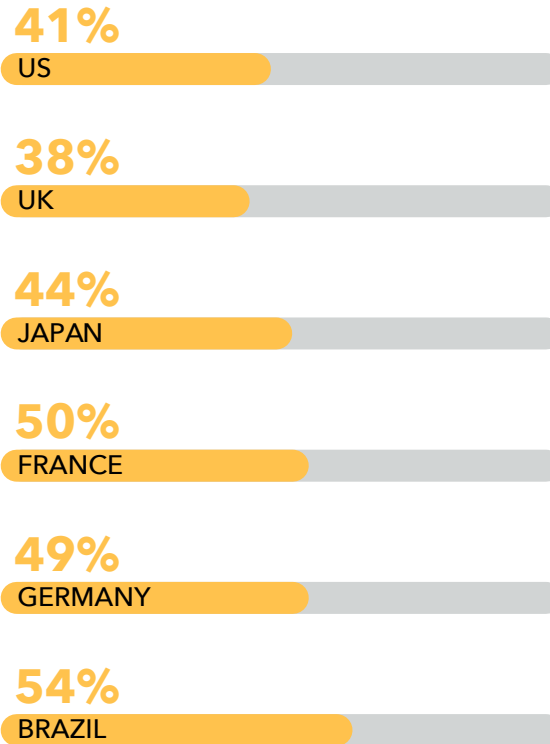
BY COUNTRY



This survey is extremely relevant and timely during this time – not only to existing global brands but to any business with aspirations to go global or to gain consumers’ trust in any part of the world. It’s become imperative for brands to cater to and authentically connect with their customers in every market. Getting – and keeping – customer trust has never been more important.

Especially in the last two years, the pandemic (and the resulting acceleration of digital transformation) have upended the relationship between brands and consumers. With the explosion of global ecommerce and online shopping, consumers have access to products from anywhere. On average, our respondents say that close to half of the products (47%) they purchase are from brands that are not native to their country.

What percentage of the products that you purchase are from brands based outside your region/country?



So what will help brands stand out in every market they expand to? In this report, we tackle one part of the equation for consumer loyalty: offering customer support in their native language and other multilingual experiences. How much does it matter that you speak to your consumers in a language they understand? Is it so important that they can relate to your brand?

In the upcoming chapters, we’ll dive deeper into how consumers’ perceptions and needs have evolved. We were able to identify trends and key lessons for brands to effectively personalize their experiences to match – or better, exceed – customer expectations.



Brands need to package and deliver customer experiences differently in different markets. A one-size-fits-all approach no longer cuts it.

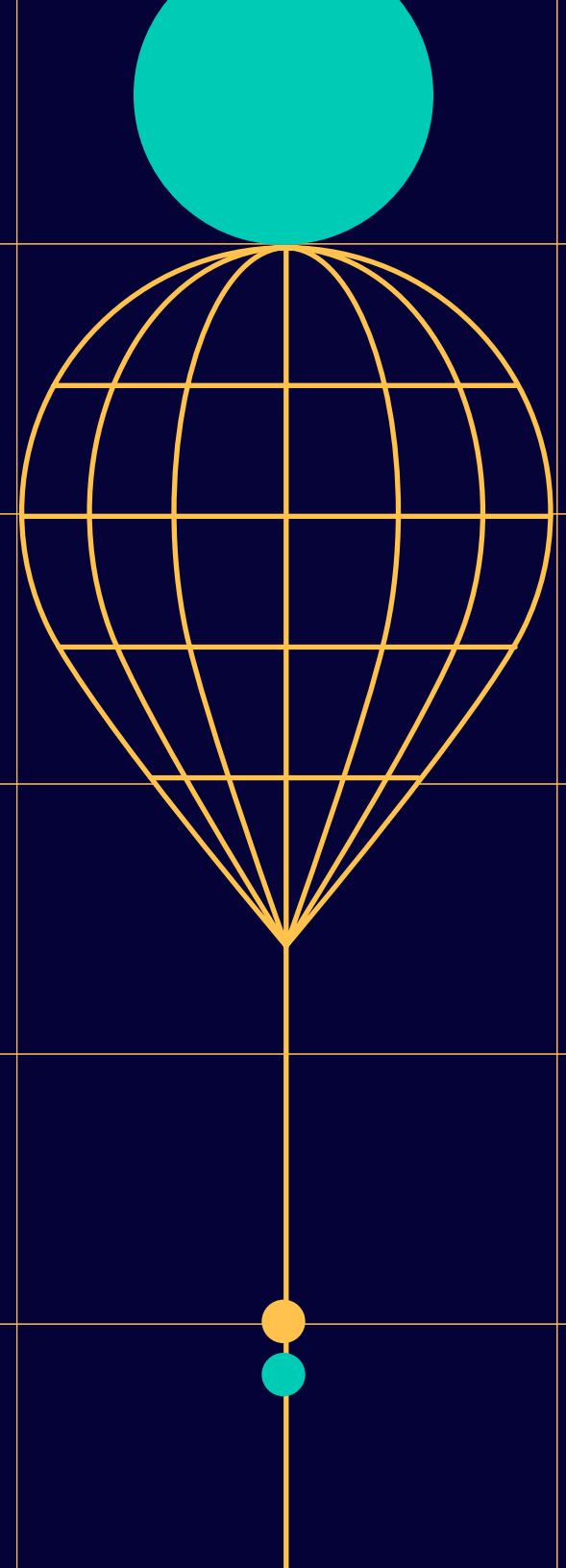
Seizing the multilingual opportunity

The state of native-language communication and ROI of multilingual customer experiences

With most brands either expanding into new markets or hoping to explore uncharted territories, the choices are plenty for today's customers. They're no longer limited to local brands. But while brands don't have to be local, they have to compete with others who might offer more personalized experiences.



Consumers expect global brands to localize their communication in their native language and address cultural nuances – consistently, across functions and digital channels.



If you're wondering where you need to be multilingual, our findings make it clear that consumers want it all when interacting with global brands: More than two-thirds (69%) of global consumers believe it's extremely or very important that brands offer an end-to-end customer experience in their native language.

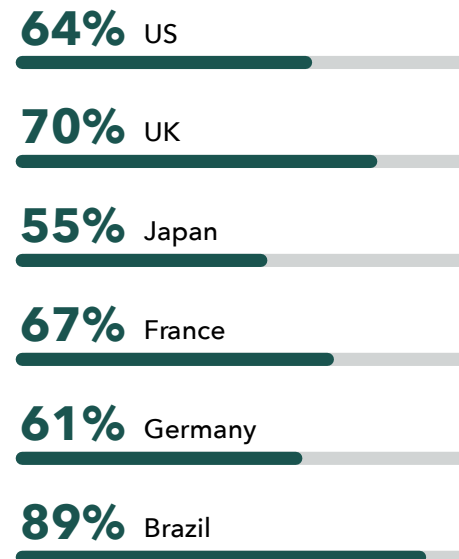
A multilingual end-to-end customer experience starts from the first touchpoint in the buying journey – a translated website, for example – to even after the product is sold – like customer support in their native tongue.

How important is it to you for a brand to offer a complete end-to-end customer experience in your native language?

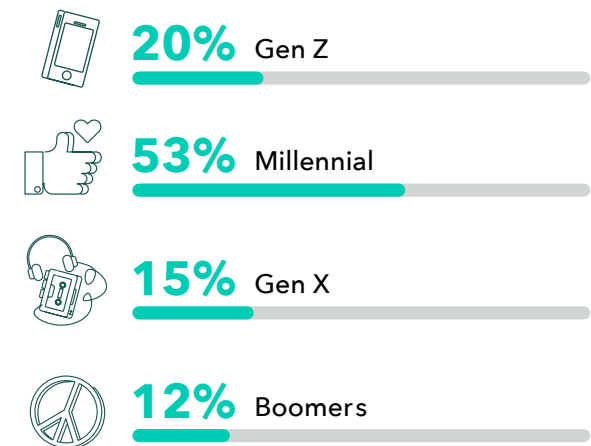


This becomes especially crucial in Brazil: **89% of Brazilian consumers** say that it's extremely or very important that brands offer end-to-end customer experience in their native language – the highest among our respondents.

BY COUNTRY



BY GENERATION



Assuming that on-location sales are in the local language – or online marketplaces and other digital selling platforms are localized – we decided to dig deeper and measure the weight of native-language promotions and customer support.

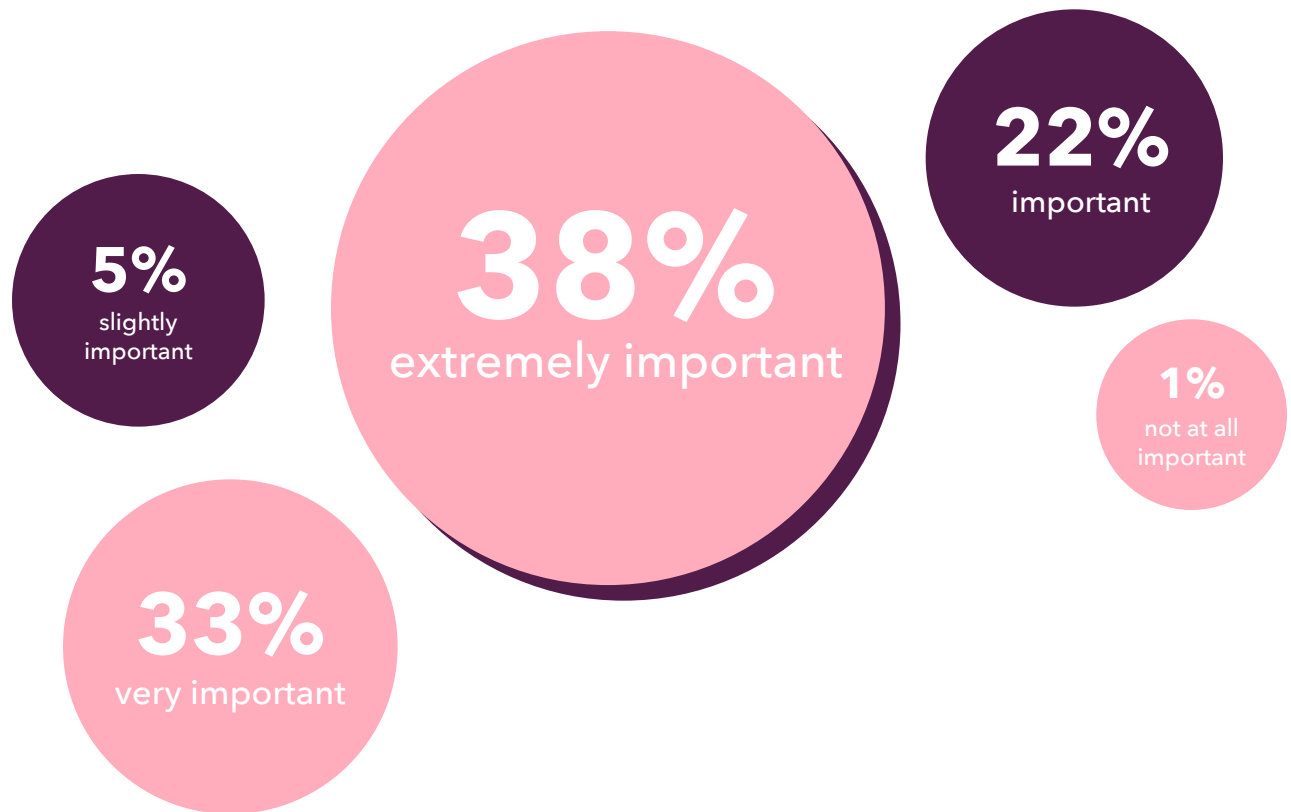
The results are telling: An astonishing

71%

of the consumers surveyed believe that it's very to extremely important that a brand promote and support their products and services in their native language.

However, there's still a huge gap that brands need to bridge. According to our respondents, fewer than 50% of brands offer any kind of multilingual customer experience. This is a critical area of opportunity that could give a brand an edge over its competitors.

How important is it to you that a brand promotes and supports its products and services in your native language?



What percentage of the brands that you have interacted with offer multilingual customer experiences?

49%

What's in it for brands

Lack of multilingual representation is a more urgent issue than more brands realize. Our survey results clearly show that multilingual communication – or the lack thereof – not only affects customers, it also has ethical, emotional, and economic repercussions for brands.

When brands don't offer end-to-end multilingual experiences to their customers, it's a bias, 57% of consumers say.

Do you consider it a bias when brands don't offer customer experiences in multiple languages?



57%

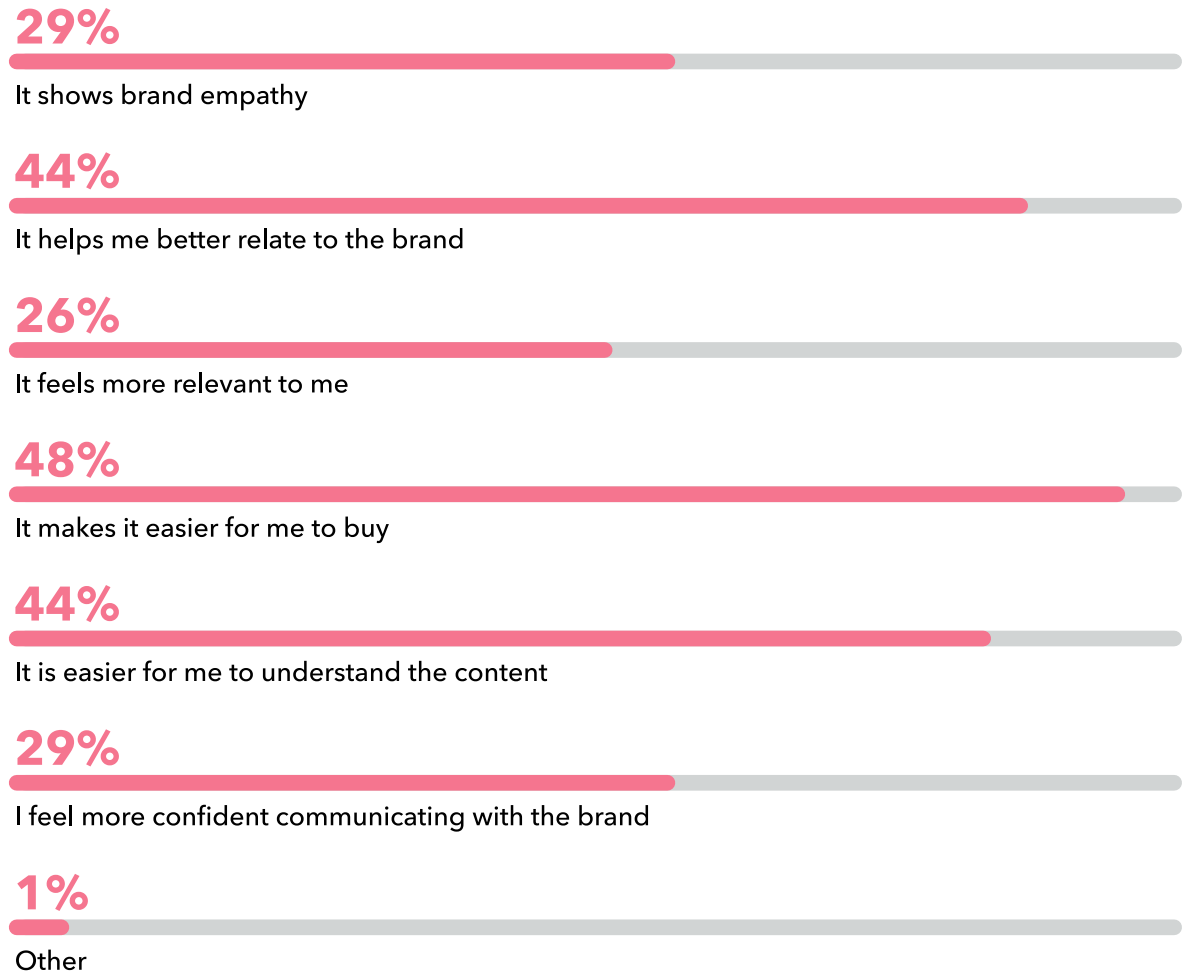


43%

We asked consumers why they want to see more localized brand communication. The top three reasons why it's important that a brand communicates to global consumers in their native language: easier purchasing (48%), easier comprehension of content (44%), and being able to relate to the brand (44%) – all of which affect whether consumers buy your product or service.

“
Consumers in Brazil (45%) and Japan (32%) prioritized brand empathy as one of the top reasons to want native-language communication from brands.

Why is it important to you that a brand promotes and supports its products and services in your native language?



Would you pay more for a product or service if a brand were to offer a customer experience in your native language?

64%

YES

NO

36%

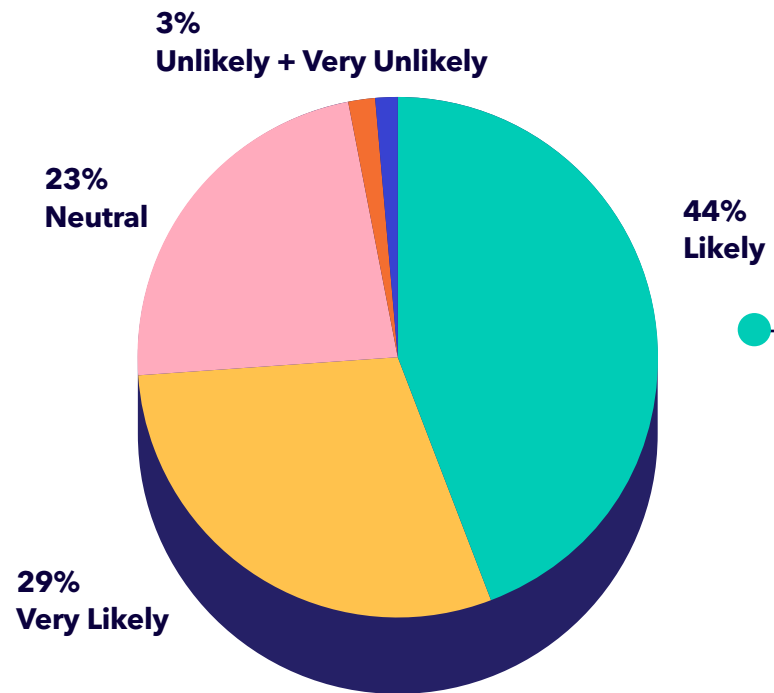


The consumers we surveyed in Brazil and France are especially particular: **95% of Brazilian** and **76% of French** consumers are very likely or likely to purchase from a new brand that markets products or services in their native language.

If you're still not convinced that native-language communication has a direct or indirect impact on the bottom line, consider this: Nearly two-thirds (64%) of the global consumers we surveyed would pay a higher price for a product or service if a brand offers a customer experience in their native language.

For brands trying to attract customers in new markets, marketing their products in the local language could be a game-changer. 74% of the global consumers we surveyed would purchase from a new brand that markets products or services in their native language.

How likely are you to purchase from a new brand if they market to you in your native language?



Where brands should start being locally fluent

Today's consumers interact with brands everywhere. Consumer data is scattered across platforms, from email to in-store to social media. Brands need to be plugged into all these channels seamlessly to get a holistic picture of the consumer. Omnichannel communication has become the norm, with brands trying to find simple ways to listen to their customers' feedback and connect the dots across multiple channels and platforms.

This creates an interesting dilemma for brands: **Where do they even start speaking the customers' language?**

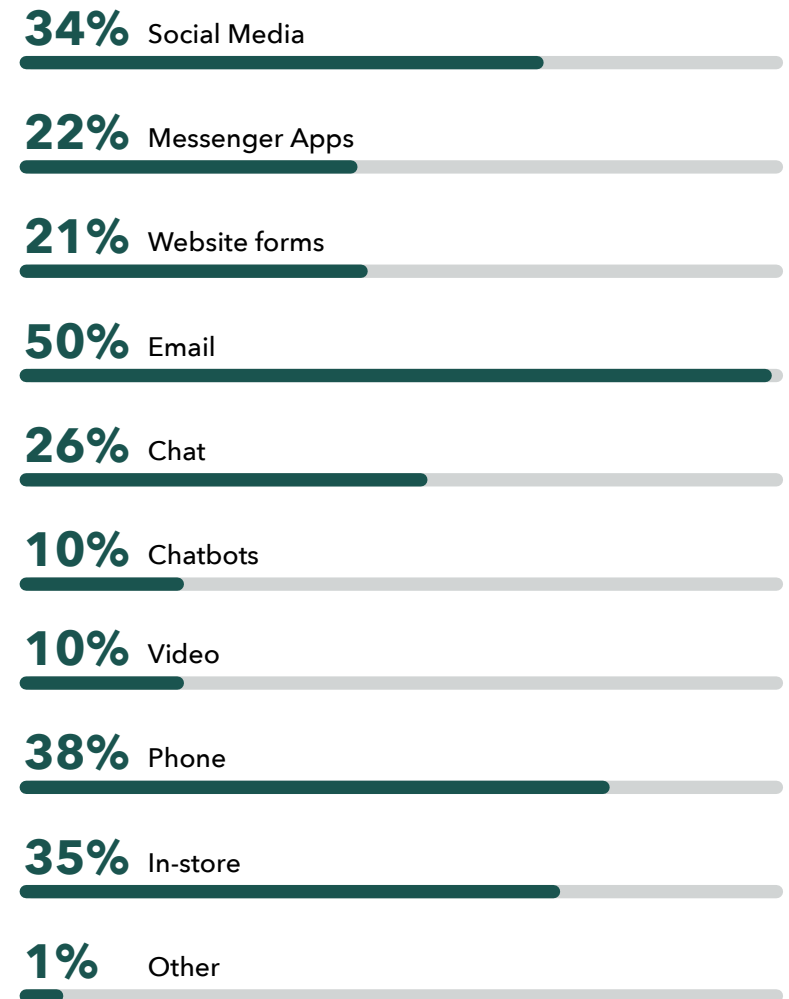
We offered our respondents a range of options, asking them to select their top three channels. While the top options remained mostly consistent across the markets, each country ranked these touchpoints differently based on their preferences and priorities.

Email is a great place to start for brands just starting to go global: It reigns as the number one channel for consumers to communicate with brands in their native language, with 50% of the votes.

While traditional options like phone and in-store top the list, **emerging channels like social media, chat, and chatbots are not far behind.**



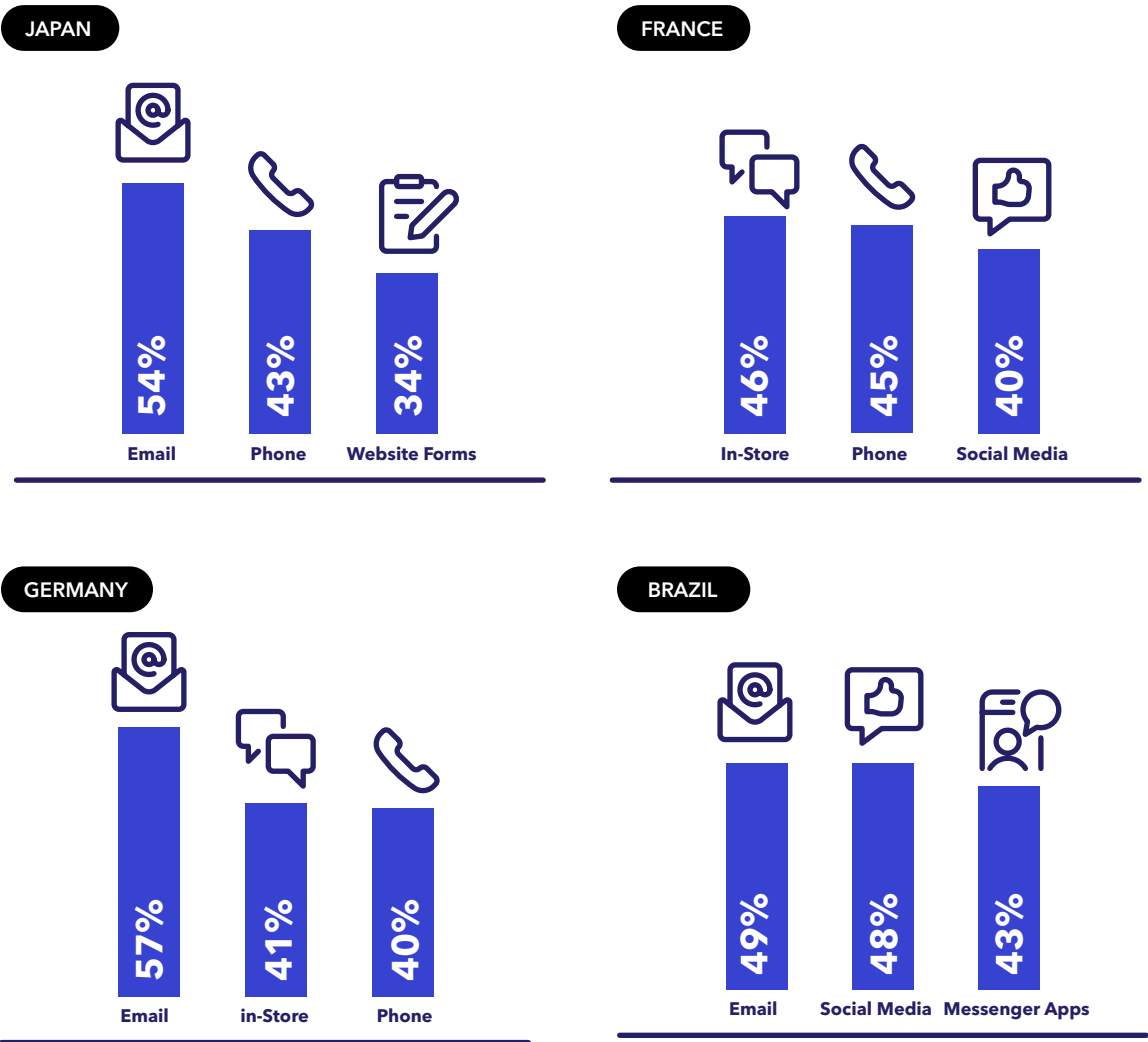
Which of the following channels do you prefer to use to communicate with brands in your native language?



Consumers' communication preferences vary across the world. Brands need to know which channels to prioritize so they can meet their customers where they are. For example, consumers in Brazil rank messenger apps and social media higher than phone and in-store, signaling the need for faster response and issue resolution. Those in France, on the other hand, prioritize in-store and phone higher than everything else, indicating how important human interaction is for these consumers.

We also studied the relationship between generations of consumers and preferred channels. Younger consumers (Gen Z) rank social media as their top channel, while the other generations depend on email for multilingual brand communication – with the percentage of users increasing steadily from Millennials to Boomers.

Top three communication channels by country



UK



Email



Phone



Social Media

US



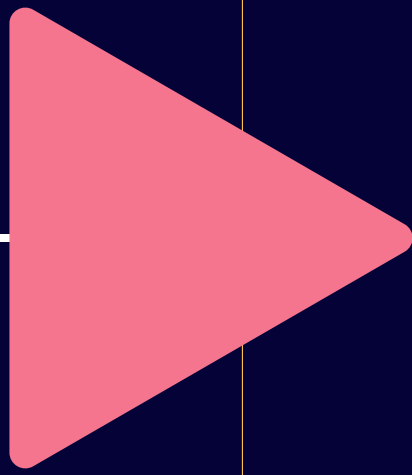
Email



Phone

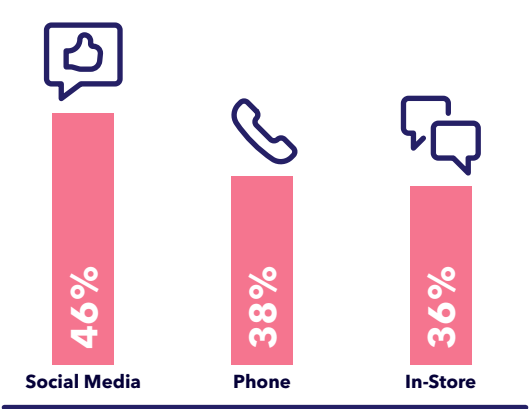


In-Store

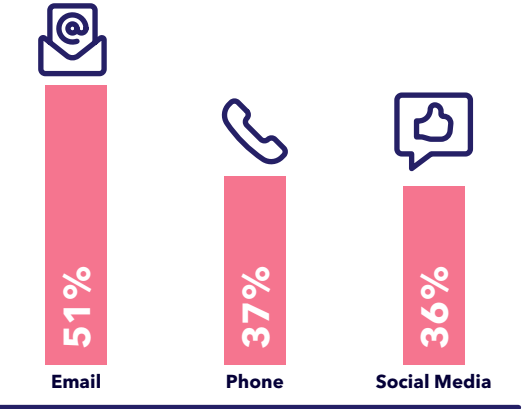


Top three communication channels by generation

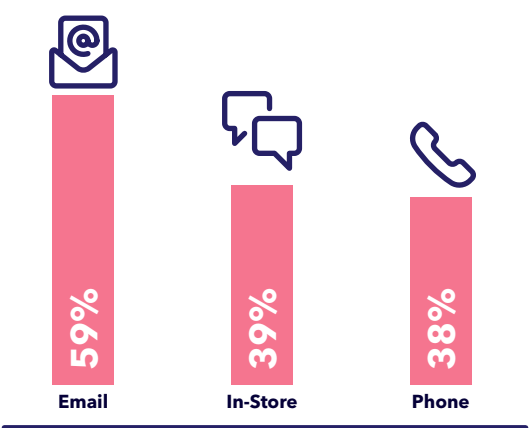
GEN Z



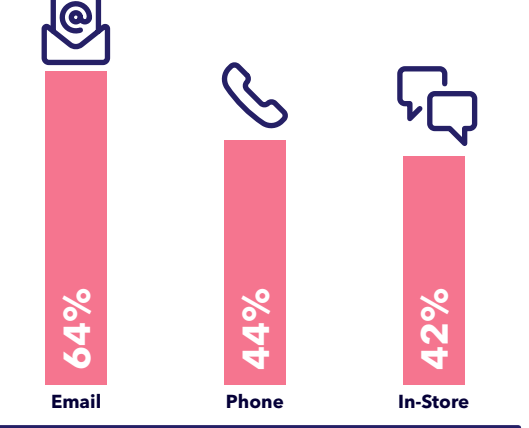
MILLENNIALS



GEN X



BOOMERS



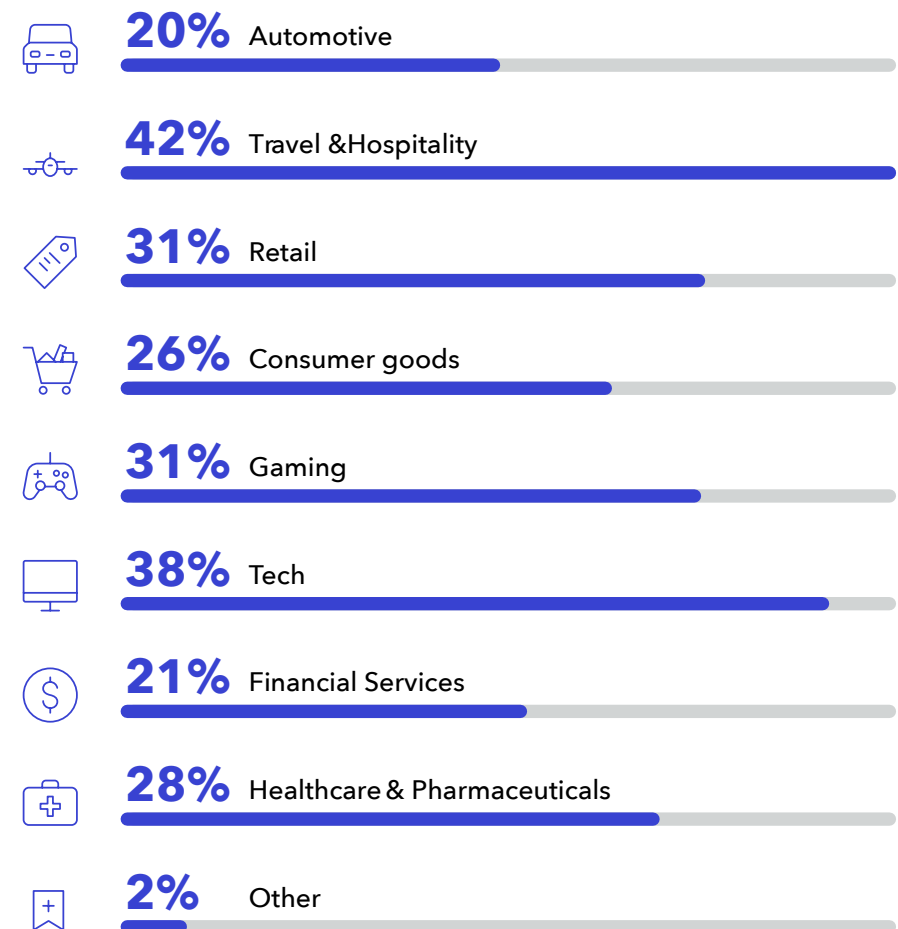
Who's getting it right

So are there any brands that hit all the right notes with customers? In our survey, we asked consumers to identify the top three industries in which brands usually get native-language customer experiences right.

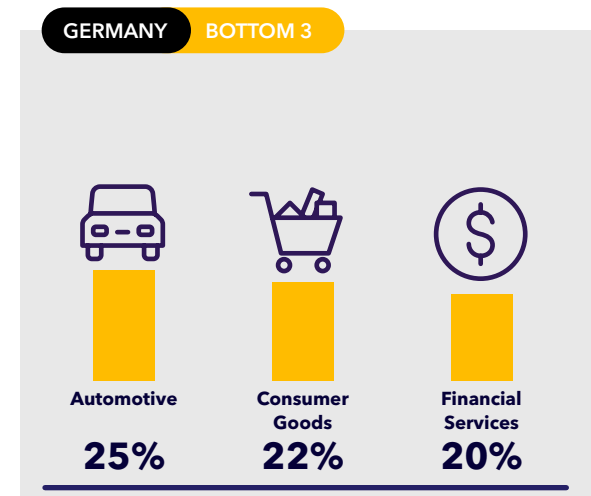
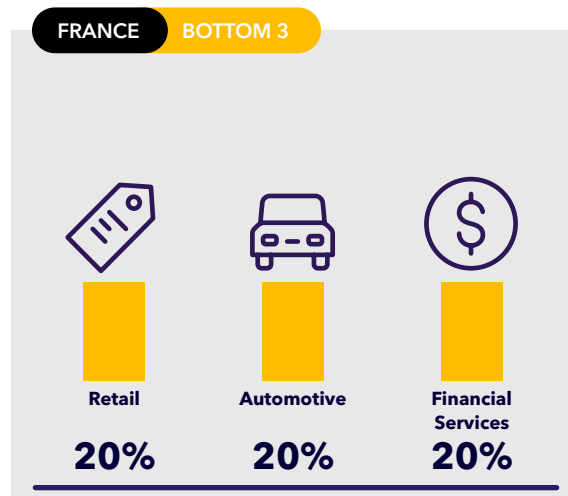
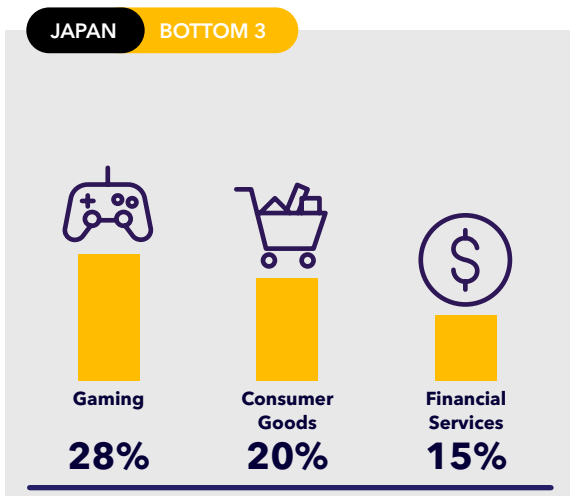
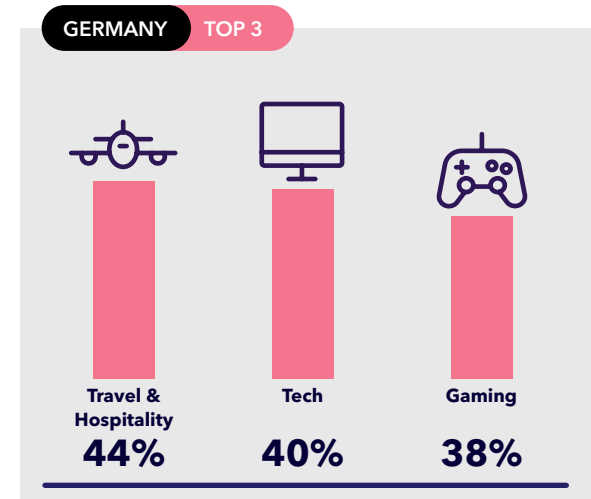
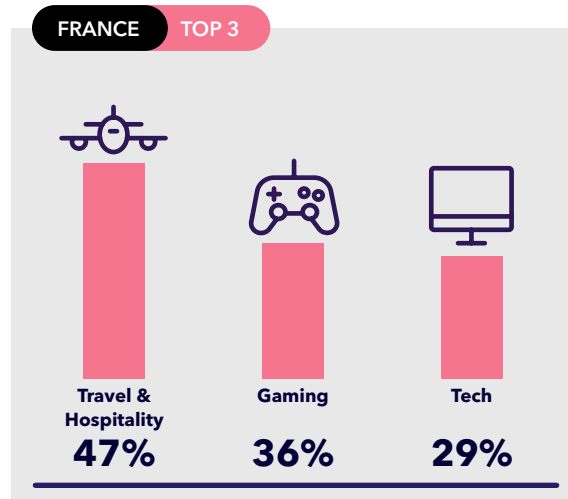
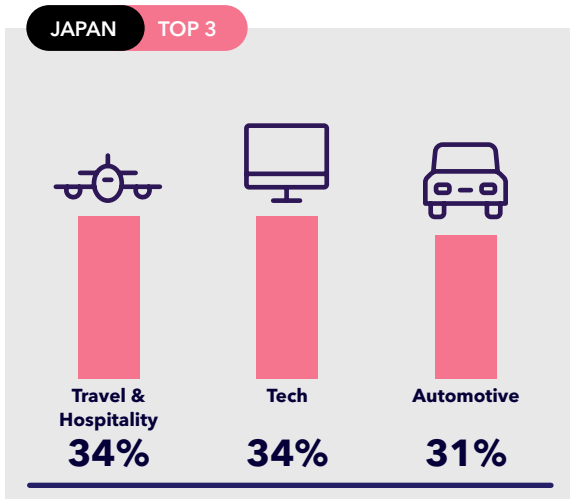
According to our respondents, the top four industries that deliver the best localized, multilingual customer experiences overall are travel (42%), tech (38%), retail (31%), and gaming (31%).



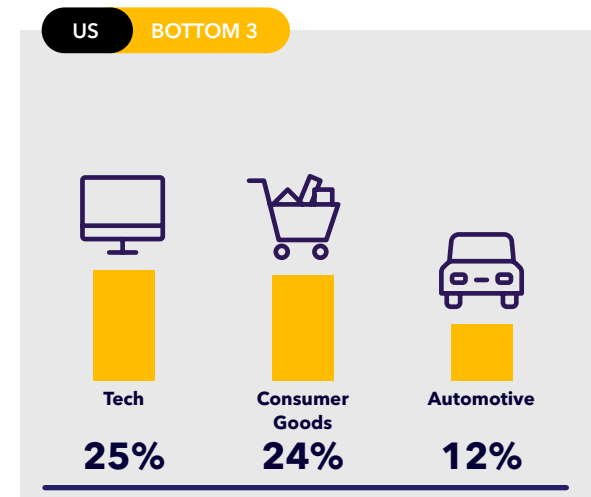
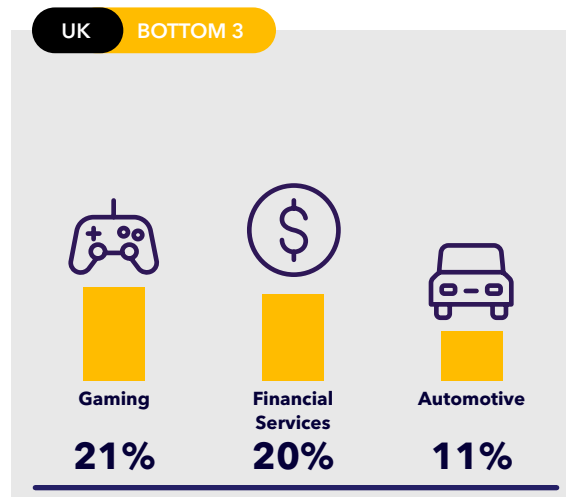
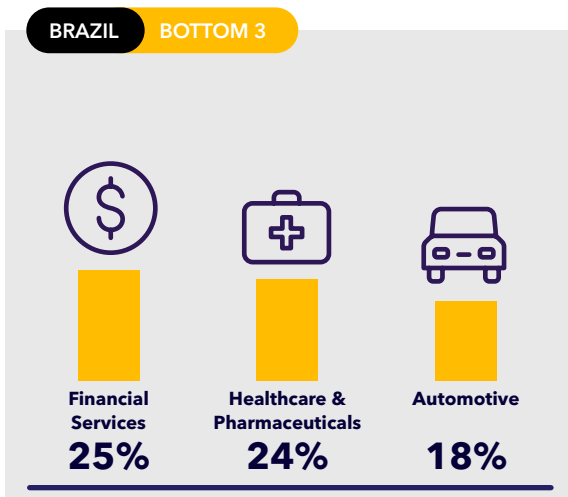
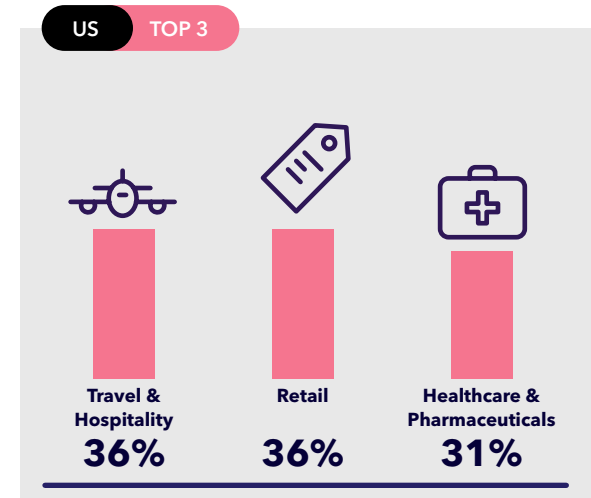
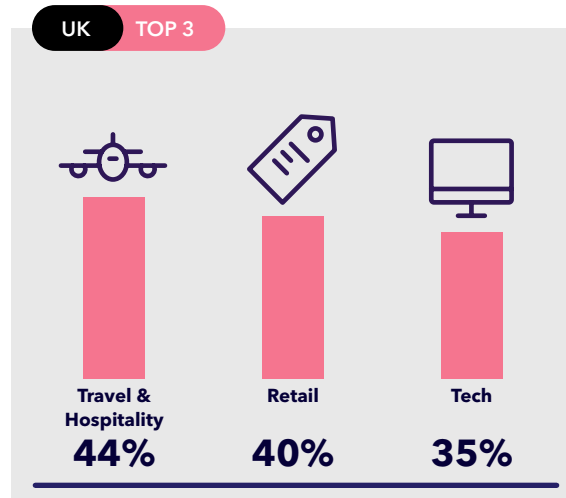
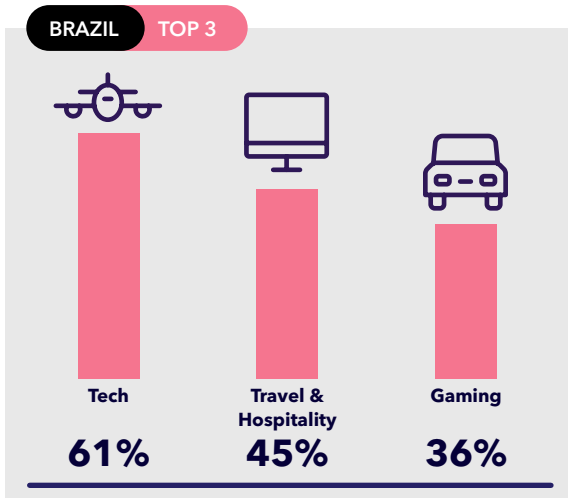
Which of the following industries do you think offers the best localized, multilingual customer experiences?



The most successful industries in each country – and the ones that need to improve



The most successful industries in each country – and the ones that need to improve

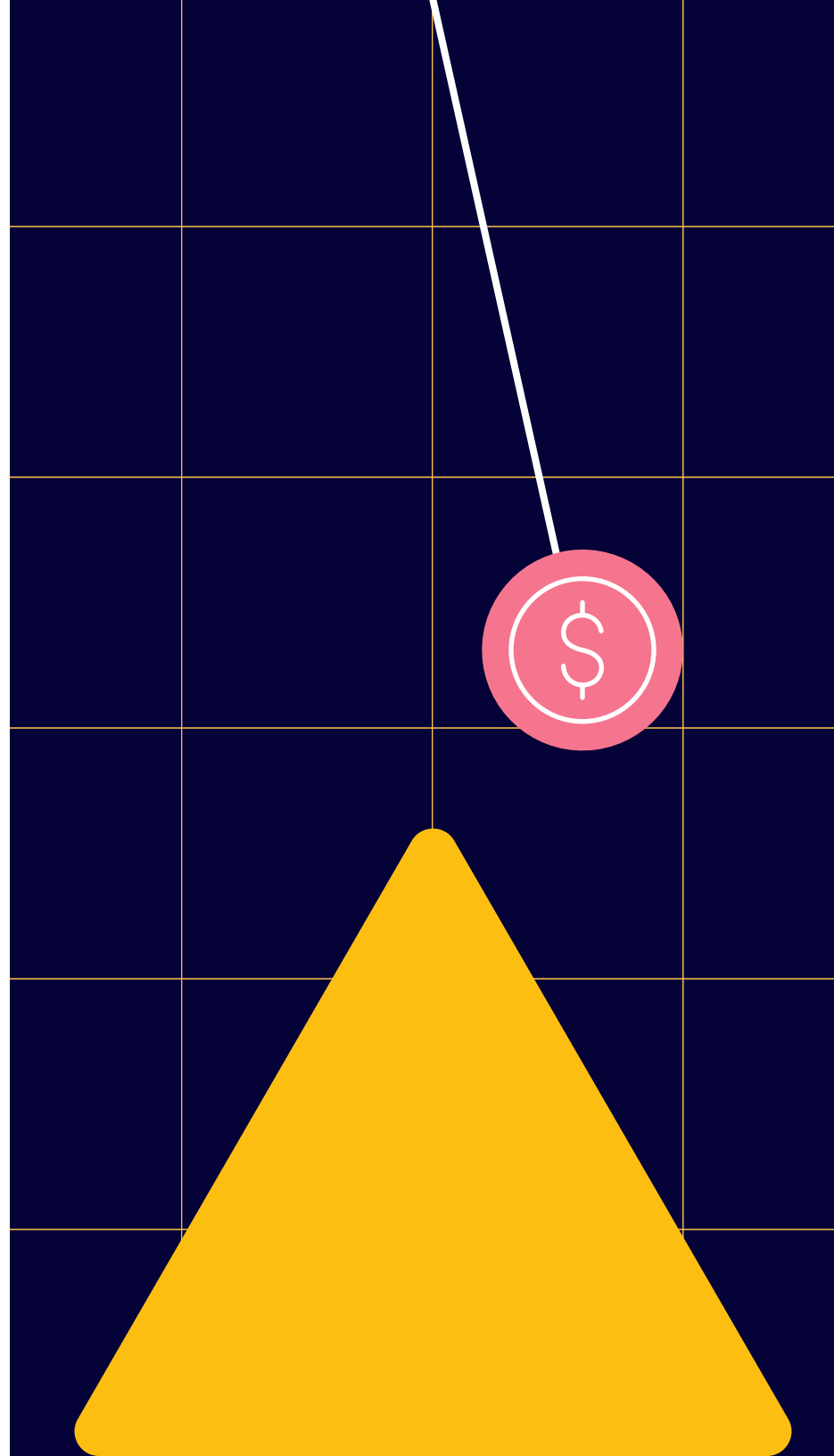


Keeping the relationship alive, after the sale

What excellent multilingual customer support looks like – and why brands must offer it

Now that we've established that native-language communication can help brands attract customers in new markets, the logical next step is to understand if it plays a role in retaining these customers.

A brand's relationship with the customer does not end with the purchase. The buying journey has evolved and expanded to include more touchpoints even after the sale. Customers feel the need to be supported and listened to – and the best way to retain them and keep them coming back for more is to be receptive to their feedback and quick to solve their problems. This has made customer service one of the key areas of opportunity for brands to show empathy and build loyalty. Good after-sales care has the power to **convert customers into advocates** for a brand. That's why, after studying the necessity of end-to-end multilingual communication, we decided to zoom into the impact of native-language customer service.

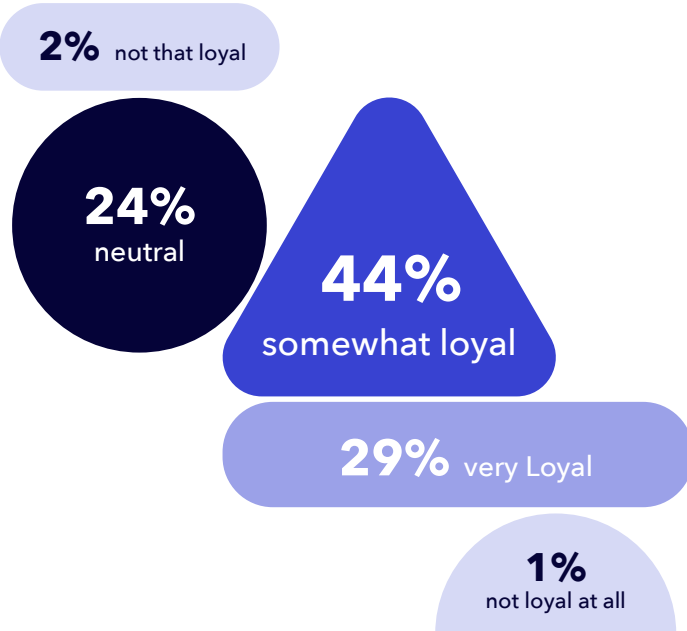


It all translates into loyalty

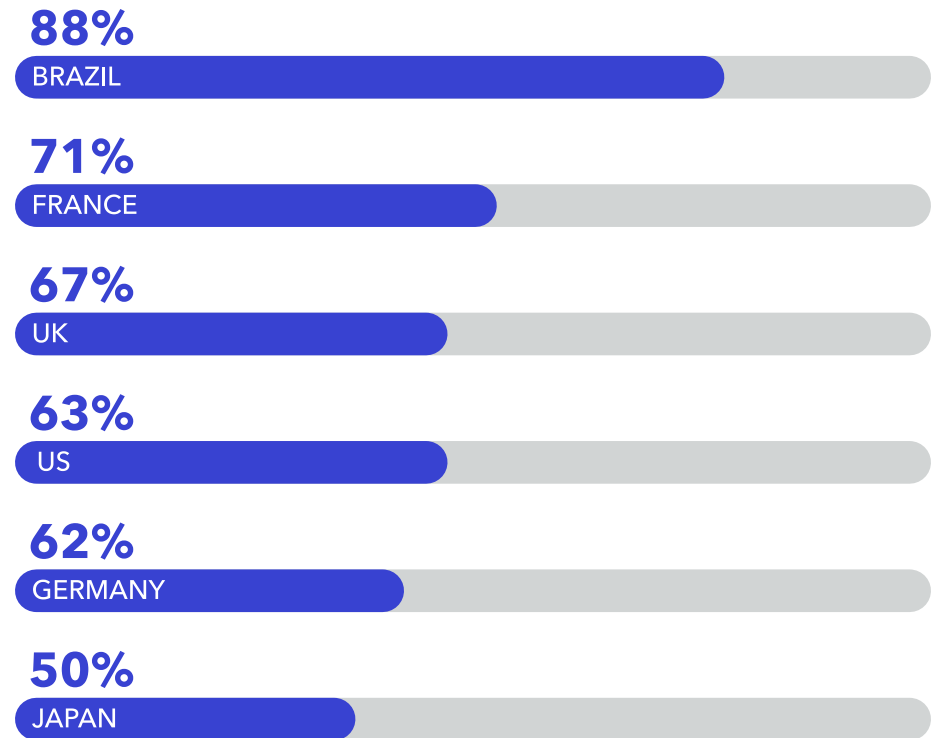
So how likely are consumers to stick with a brand that offers customer support in their native language? We asked them directly.

Not surprisingly, native-language customer support has a definite impact on customer loyalty: 73% of our respondents would be somewhat to very loyal to a brand that offers support in their native language.

How loyal would you be to a brand if they offered customer support in your native language?



Countries, from most to least loyal to native-language customer service

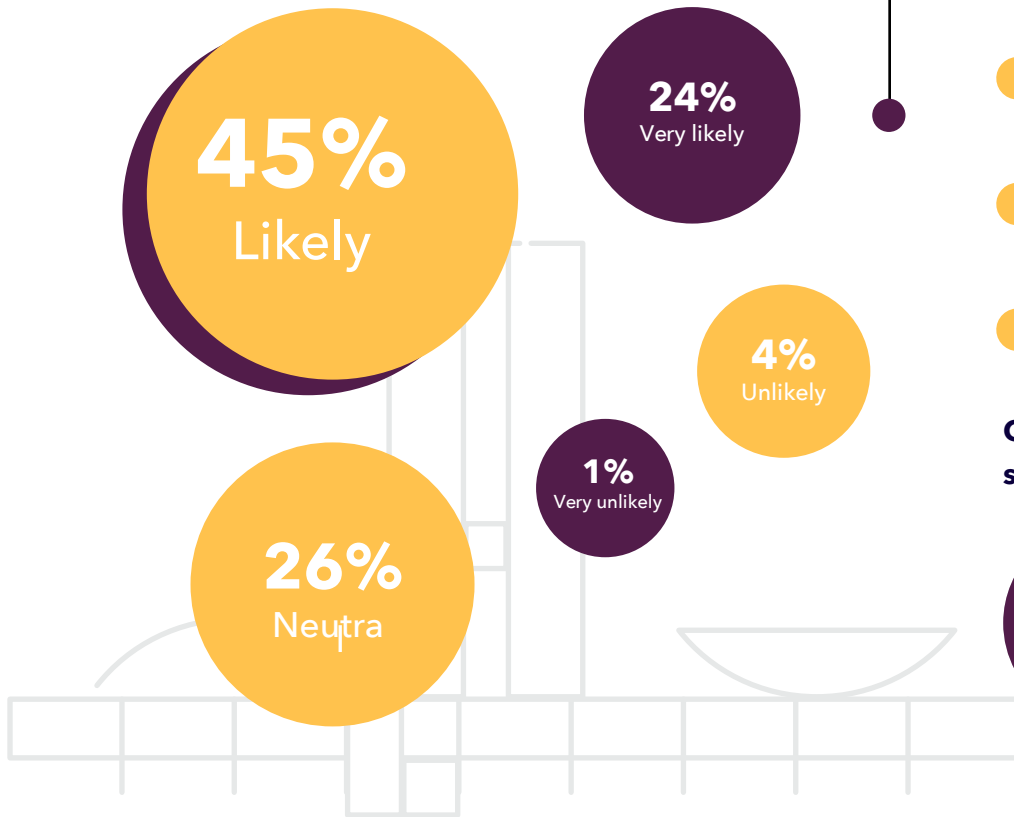


Generations, from most to least loyal to native-language customer service

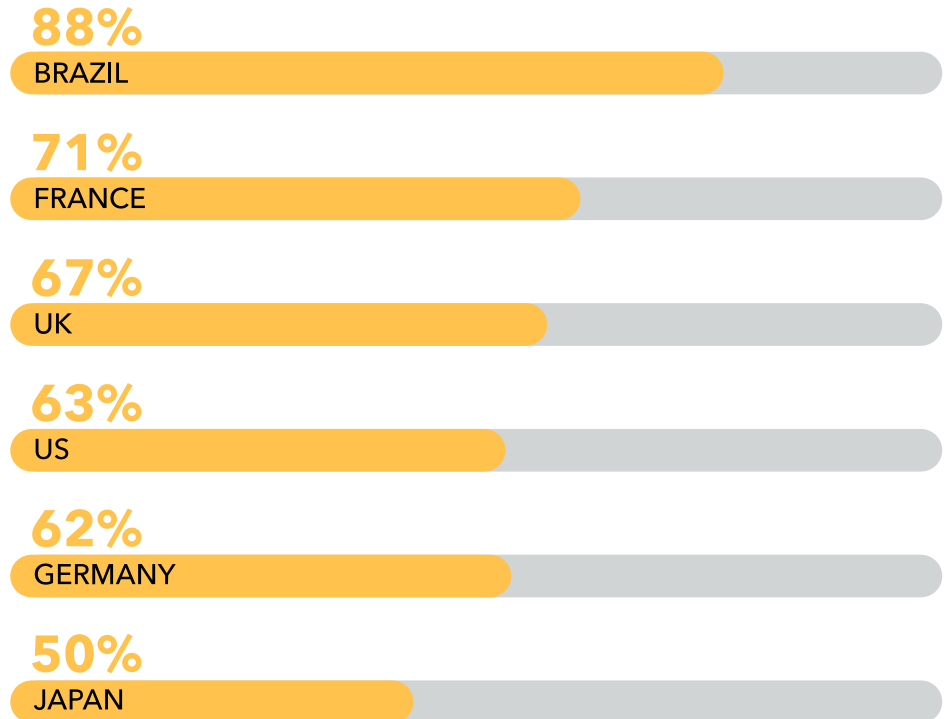


And what if a brand doesn't offer multilingual customer service? It could hurt the brand, our respondents say. Just as consumers are willing to stick with a brand for native-language customer support, they're also willing to leave brands that don't offer it: 68% of consumers would switch to a different brand that offers support in their native language.

How likely would you be to switch and buy a product from a different brand that offers customer support in your native language?



Countries likely to switch brands for native-language customer support (most to least)



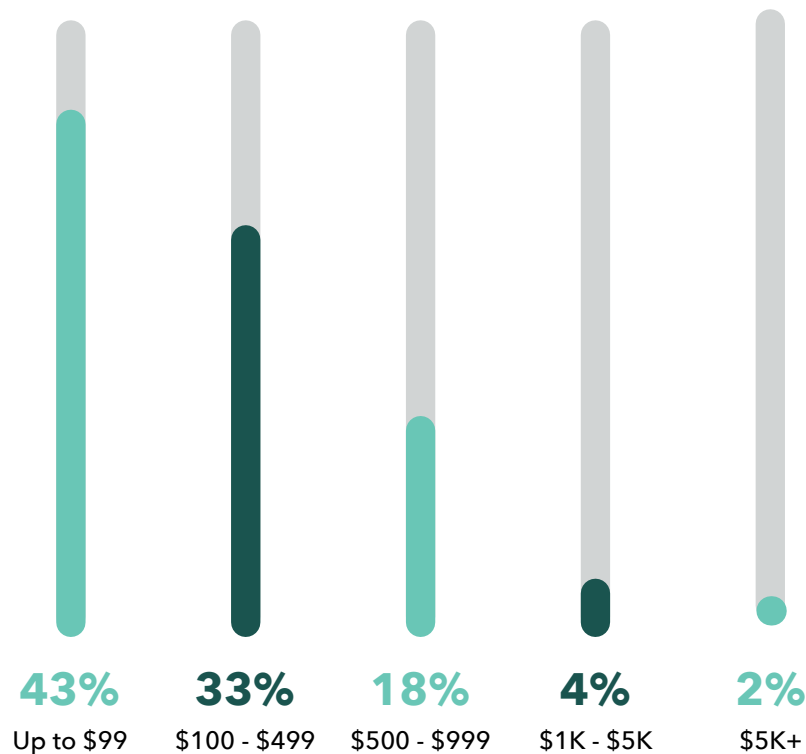
Generations likely to switch brands for native-language customer support (from most to least)



What losing customer loyalty looks like in \$\$\$

We asked consumers in the US to roughly estimate how much they'd stop spending on a brand that does not support them in their native language: 1 in 4 US consumers say they will not spend more than \$500 on these brands.

On average, how much money do you stop spending with brands that do not offer customer support in your native language?



Poor native-language service: as much a liability as no multilingual support

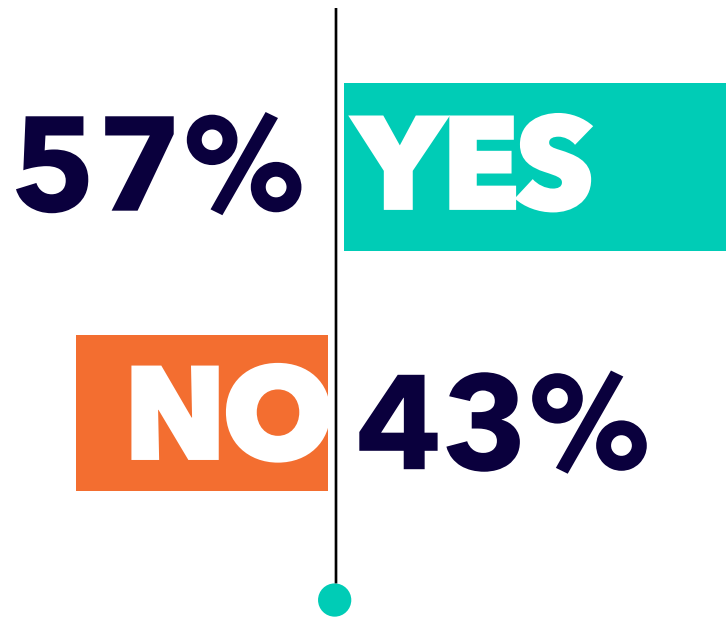
Lack of multilingual support isn't the only factor leading to a drop in customer loyalty. For brands that already offer native-language customer support, the challenge lies in ensuring high quality.

Even in the limited multilingual experiences customers get from global brands, there are issues with poor customer service:



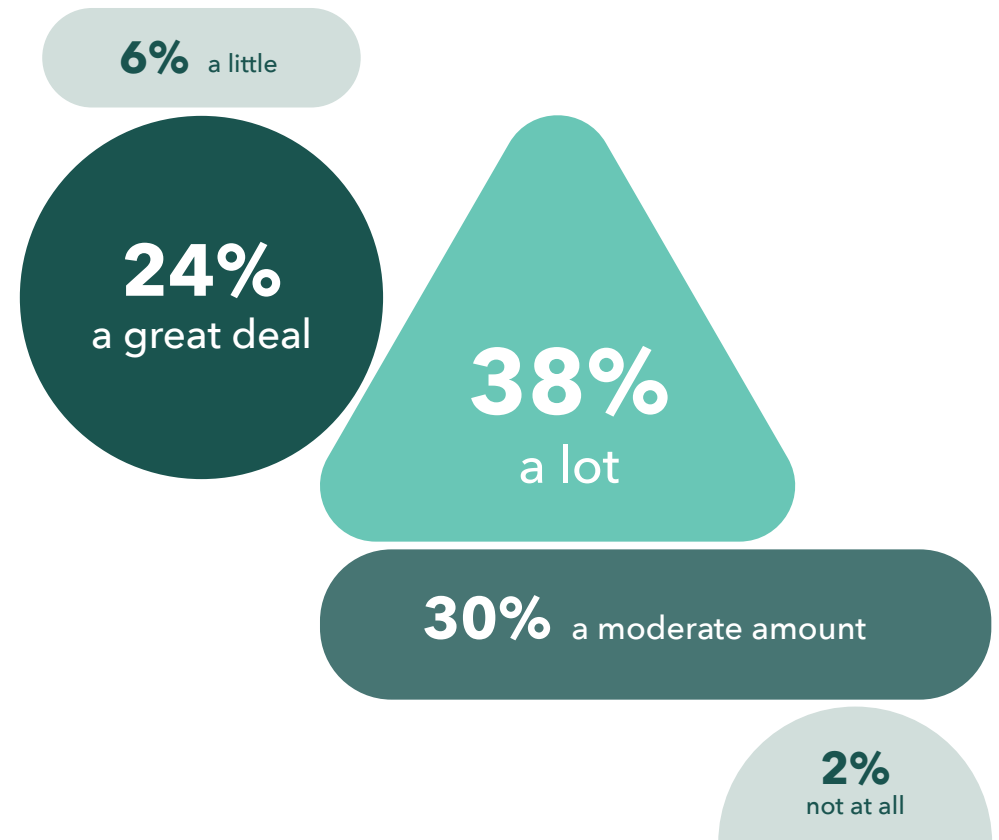
57% of our respondents admit that they've had at least one negative brand experience with customer service in their native language.

Have you ever had a negative brand experience with poor customer service in your native language?



An overwhelming 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.

How much does it impact your trust and loyalty toward a brand if they offer poor quality customer support in your native language?

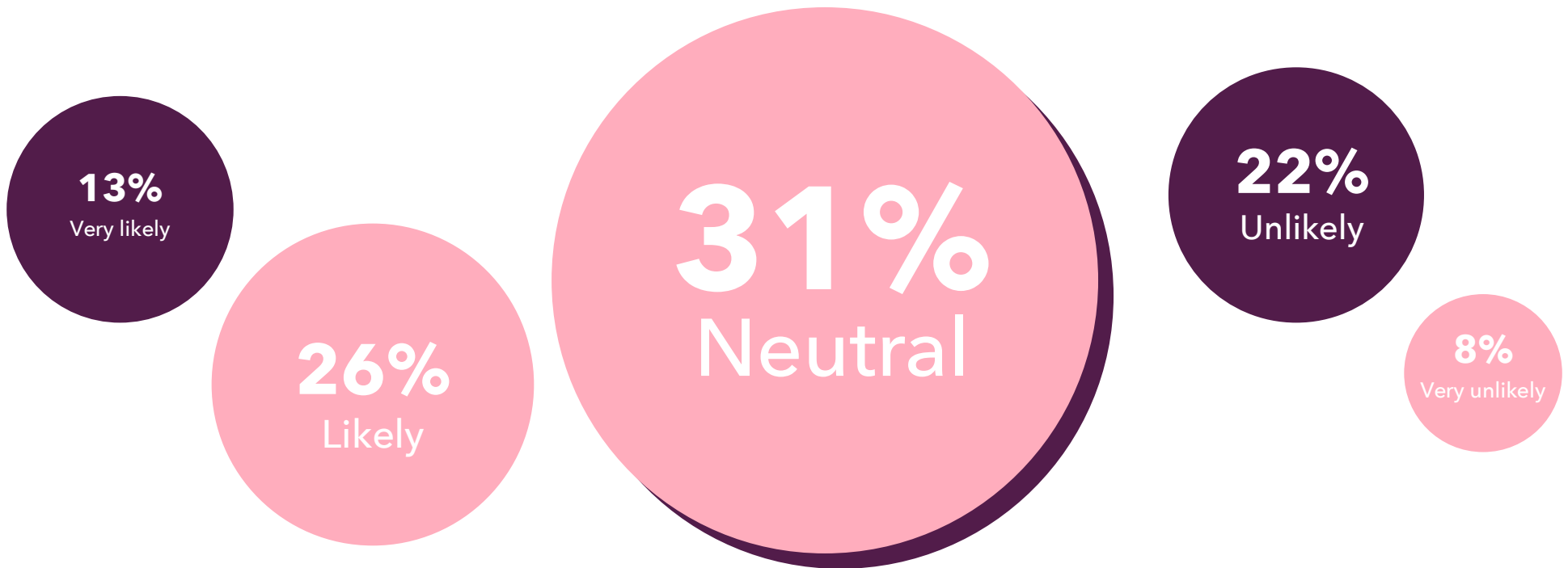


For brands that are just dipping their toes into offering localized support, this might seem a little daunting. However, consumers are not unforgiving. While the ideal scenario would be that brands get it right starting from the get-go, in cases where flawless native-language service isn't immediately feasible, brands need to be prepared to keep learning and growing. Staying alert to cultural differences and shifts in local trends is key.

Don't fret: you get some free passes

Multilingual customer service comes with a bonus advantage: Nearly 40% of global consumers are very likely or likely to overlook poor customer service if it's offered in their native language.

How likely are you to overlook (relatively) poor quality of customer service if it is in your native language?



An AI-powered, human-refined machine translation platform like Unbabel can help you offer fast and accurate support that you can scale and improve.

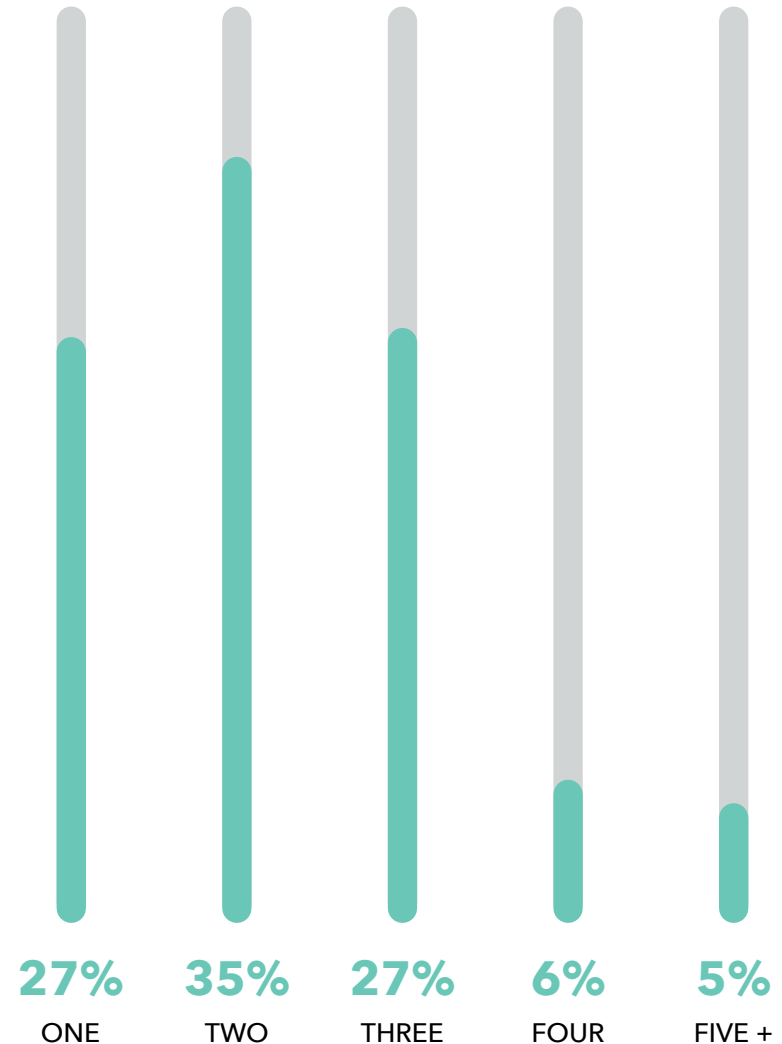
The caveat: This is not a lifetime offer

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.



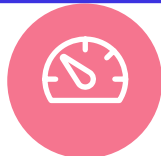
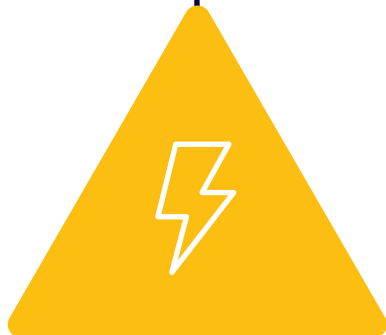
The key takeaway: Some kind of multilingual customer service is still better than no native-language support, but only as long as the brand keeps progressing toward higher quality.

How many negative customer support experiences in your native language would lead you to stop buying from a particular brand?

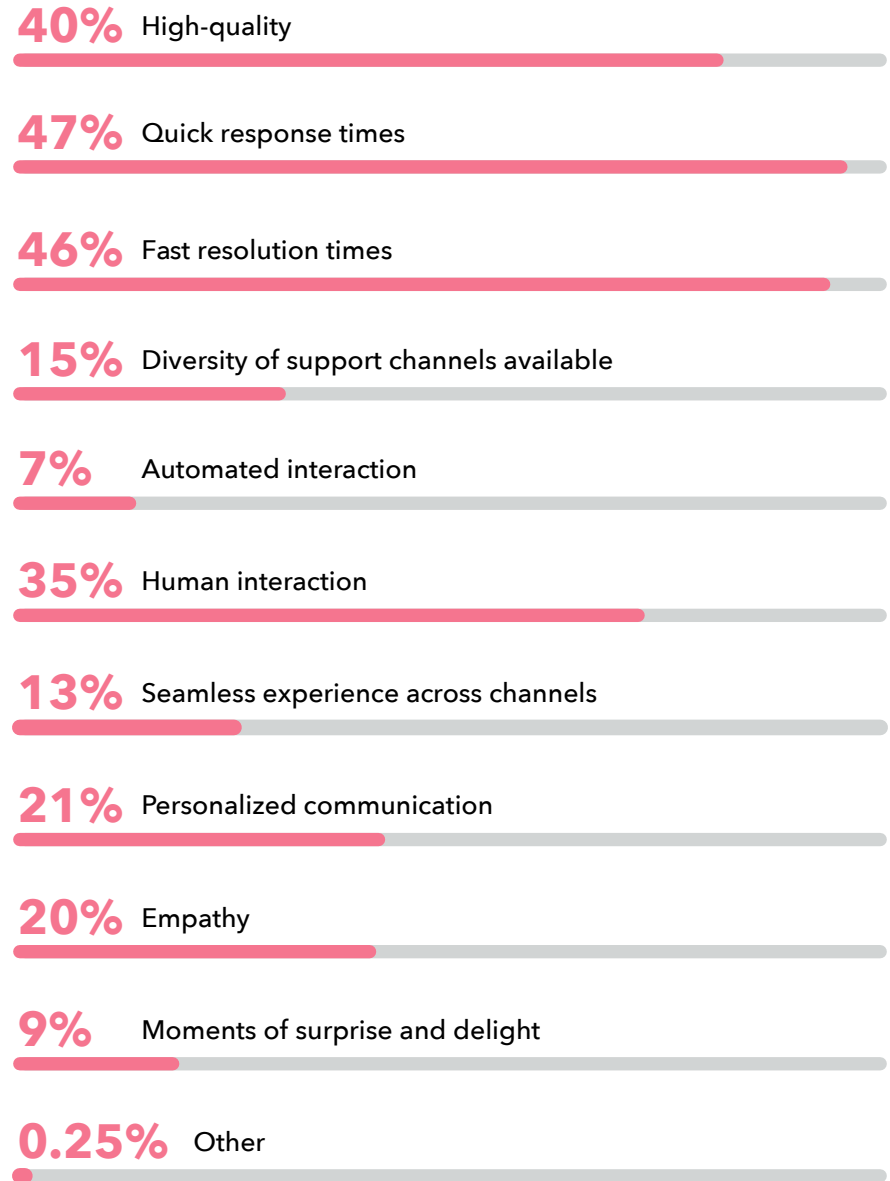


What counts as high quality

We asked consumers what their top three priorities are when it comes to native-language customer support. Quick response (47%), fast resolution of issues (46%), and high translation quality (40%) come out at the top.



What is most important to you when receiving customer support from brands in your native language?



Missteps to avoid in multilingual customer service

Another way to grasp what excellent multilingual support looks like is to understand what consumers view as poor customer service. So we probed deeper into what turns consumers off.

Poor quality of translations is the top misstep that leaves more than half of our respondents (52%) dissatisfied. The other challenges that customers face when interacting with brands in their native language are lack of multilingual customer experiences (36%), lack of representation (33%), and lack of diversity and inclusion (28%) – all showing that **consumers want to see brands' values** reflected in the customer experience.

This goes to show that high-quality customer service starts with the customer at the center – right from when brands design the experience. Customer service needs to accurately reflect and represent customers with a clear understanding of cultural nuances.

What are your challenges with global brands that offer localized customer experiences?

20%

Cultural appropriation

20%

Offensive use of slang or idioms

22%

Stereotyping

20%

Use of controversial imagery

28%

Lack of diversity and inclusion

33%

Lack of representation

36%

Lack of multilingual customer experiences

52%

Poor quality of translations



More than one-fourth (26%) of the Japanese consumers we surveyed believe that cultural appropriation is one of the biggest issues when global brands offer localized customer experiences – the only ones to include it in their top three among all our audiences.

What are some top things you'd like to see global brands improve upon with their multilingual customer experiences?

30%

More brands offering multilingual customer experiences

23%

More languages supported

19%

More localized content and visuals

22%

More diversity and inclusion

How global brands can improve

To get a clear picture of what brands should do next as they improve the quality of customer support they offer, we asked our respondents to share their expectations from global brands.

It's clear that it's not enough for brands to just offer native-language customer support; consumers expect it to be high-quality (42%). Consumers want to see global brands providing human interactions in their native language (32%) and more brands offering experiences in multiple languages (30%) in more digital channels like email and chat (25%).

25%

Language support across more digital channels

22%

More seamless multilingual experiences across channels

42%

High-quality support in my native language

32%

More interaction with human native speakers

24%

More automated support in my language

1%

Other

Key takeaways & recommendations

A quick summary of the top findings in this report and some Unbabel tips



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.



Highly localized, multilingual customer experiences are no longer nice-to-haves. They're essential for a brand to truly connect with their customers.



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

It's not just poor customer experiences that lead to consumers defecting; if a brand does not offer customer service in their native language, consumers will switch to competitor brands that do.



Tip: Partner with the right technology platform that allows agents to instantly communicate in customers' native language on any digital channel.



1 in 3 global consumers cite lack of multilingual experiences, lack of representation, and lack of diversity in localized customer experiences.

Not only that, 1 in 5 consumers also say empathy is a mark of excellent customer service. Brands need to be clear on their values and commit to representing the audience to build customer loyalty.



Tip: Offer empathy and anti-discrimination training to your agents before they start fielding customer queries.



Brands must gather insight into your customers' preferred channels to help prioritize the different means of communication.

When expanding into new markets, understanding where the consumers seek to connect with brands is crucial. While email is still one of the top channels, social media, chat, and messenger apps are fast emerging as ways to reach brands quickly.



Tip: Offer a seamless digital experience, both on customers' desktops as well as mobile devices such as phones and tablets. Use a CRM to keep track of communication with your customers so they don't have to repeat information when they reach out to you.



Both lack of native-language support and low-quality multilingual support will cost brands.

It's important to find a solution that lets you offer native-language customer service that you can continue to scale and improve.



Consumers around the world value quick response times and faster resolution times in native-language customer service.

Instead of hiring agents for native-language skills or stretching your existing workforce to take on more customer inquiries or respond faster, use AI-powered machine translation to make your best agents instantly fluent in any language.



Tip: Combine AI solutions along with support agents to offer quick native-language support (chatbots, for example) even when there are spikes in customer inquiries.



It's crucial to get the balance right between fast customer service and high translation quality when delivering multilingual support.



A machine-translation-only solution helps increase speed but does not address accuracy. Human-only translation is accurate but not scalable. Instead, use human-in-the-loop machine translation to provide fast, high-quality translated support.

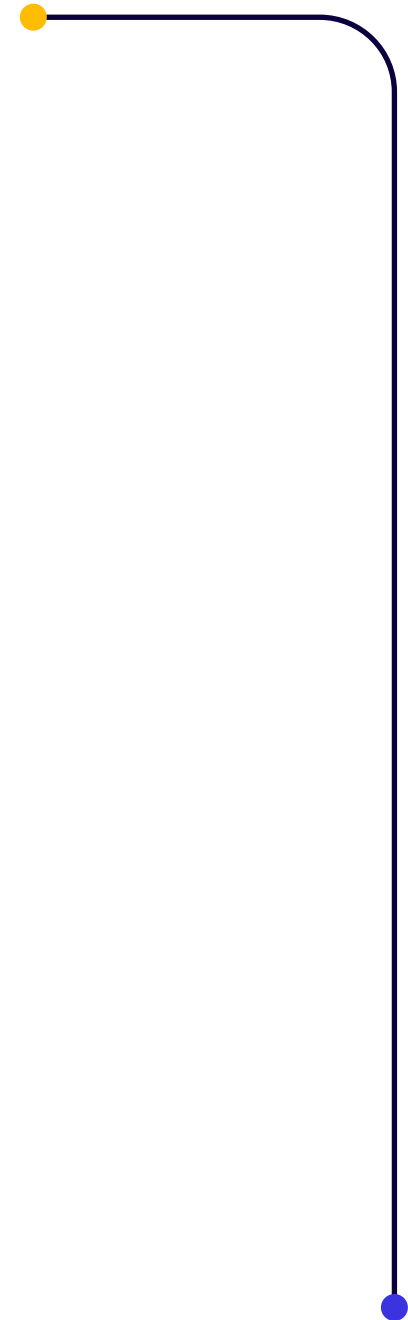


Tip: Use chat to direct customers to the right resources for immediate help and connect them to a live agent if necessary. Offer self-service support like FAQs with information on shipping, payments, returns, refunds, etc., readily accessible.



When localizing customer support (or other customer experiences), it's important to be sensitive to customer needs and cultural expectations.

It's not enough to just translate content; brands also need to take cultural nuances into account when offering multilingual experiences to customers. A machine translation platform that uses a diverse global network of human editors can help you get started with highly localized support.



Unbabel enables enterprises to offer seamless global support in any channel, and in any language.

The company's AI-powered language operations platform combines the speed of machine translation with the polish of native-speaking editors, enabling enterprises to grow and build customer trust in every corner of the world.



Start translating today



Unbabel Your business, translated