

The 2020 Guide to Hispanic Digital Purchase Behavior

How the collective and the bidirectional
toggle inform ecommerce



 **ThinkNow**

 **9thWonder**

You've done the segmentation studies. You've parsed the data. You've sliced and diced every bit of learning you could get about your target consumer. (Maybe you even came up with a catchy name for your cohort, like "Determined Doers" or "Moms on a Mission.") Now you've got a perfect picture of one very specific type of individual.

You understand their attitudes, their beliefs and their path to purchase. And you're counting on these assumptions to inform every part of your digital marketing, from creative development and media placement to analytics and optimization.

There's just one problem.

If your consumer is one of the 60 million Hispanics who now comprise 20% of the U.S. population, you probably can improve their online purchase path and your ecommerce revenue.

Why your Hispanic digital marketing may be missing the mark

All those reliable assumptions we've learned to make about the general market? They don't always hold true when we're addressing the Hispanic market. And in a world where digital marketing has exploded, with brands pumping more and more dollars into investments in the digital ecosystem, those assumptions matter.

Sometimes the differences are obvious. Language proficiency among Hispanic consumers varies. So does digital savvy.

But there's a more complex dynamic at work.

It is the unique, collective ethos of the Hispanic market, where "community above self" is the norm, where interdependence takes precedence over independence. It's a cultural framework that, in many ways, is the antithesis of the general market. And it's why brands that want to reach this audience need to start thinking about how to get their message "direct to collective."

Toggleing is a way of life

Whether offline or online, it's not unusual for Hispanics to toggle back and forth between two languages and cultures. But there is another kind of toggling that takes place in their digital interactions. Although many times these consumers are going online for themselves, it's just as likely that they're doing it on behalf of a larger group – a collective of family members and relatives who may or may not live in the same house or even the same country.

It's easy to miss the differences unless you're diving deeply into your site metrics. Fortunately, there are steps brands can take to rethink the way they engage these consumers.

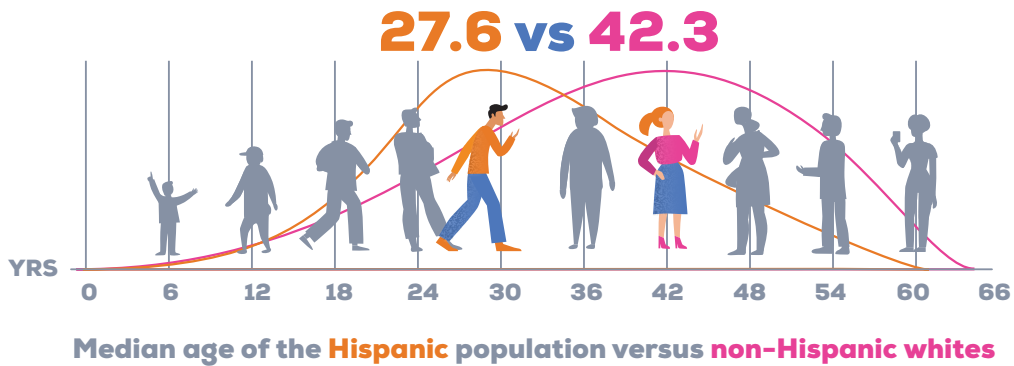
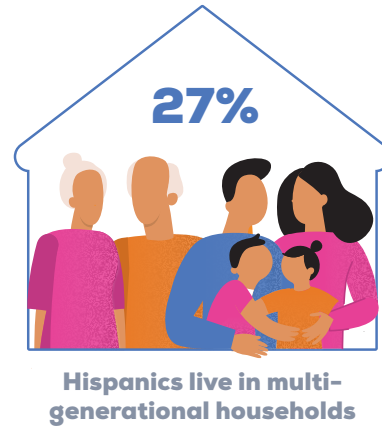
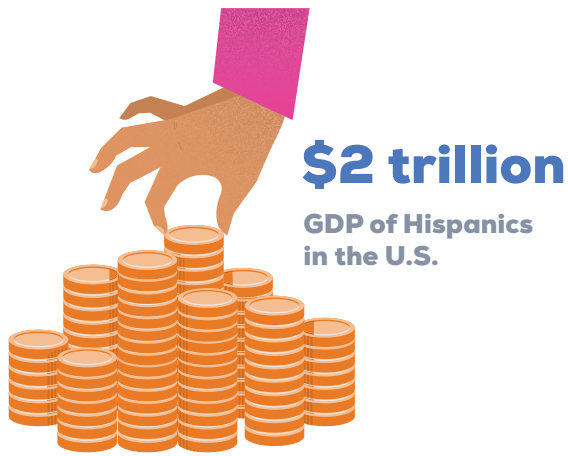
Why getting it right has never been more important

- **Hispanics are the second-fastest-growing segment of the population.** With a median age well below their non-Hispanic white counterparts, they provide a greater lifetime value to brands that earn their loyalty.
- **Hispanic households are larger.** And larger households usually spend more. In fact, Hispanic households spend over \$500,000 more than non-Hispanic white households over the course of their residents' lifetimes.
- **Hispanics are online.** For years, marketers talked about a "digital divide" that made this group difficult to reach online. Today that gap has closed, with 80% of Hispanics now on the Internet. How brands go about reaching them digitally is critical.
- **Hispanics are interconnected.** Nearly a third of Hispanic consumers live in multigenerational households, and many more stay intimately connected to their families long after they've left their childhood homes.

About this research

How does a collective cultural framework change the way the Hispanic market interacts with brands online? How is their behavior different than that of the general market consumer?

To answer these questions, 9thWonder recently completed a primary research study with ThinkNow, a leading market research firm. The study uncovered new insights about the role played by Hispanic consumers who become, in effect, digital Sherpas for their families – the guides who help the collective group navigate the Internet.



+ \$500,000

Difference in the amount spent by Hispanic households compared to non-Hispanic households over their lifetime



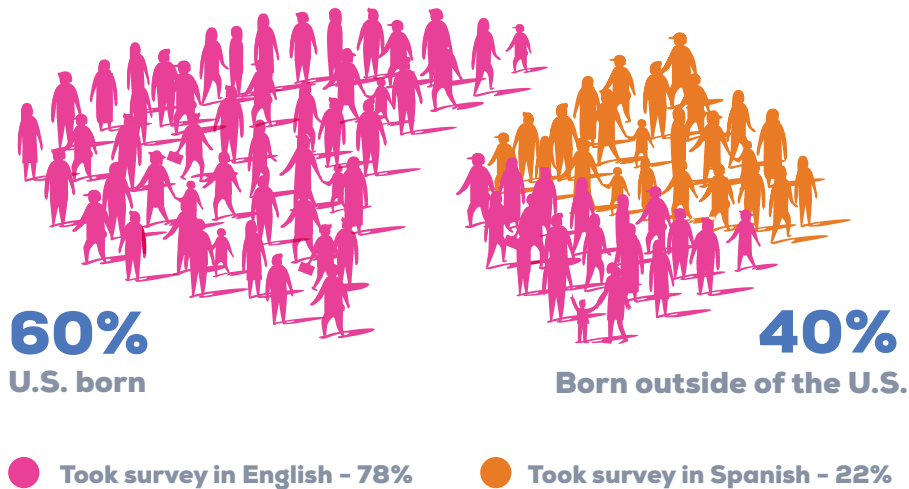
8 out of 10 Number of Hispanics who are Internet users

METHODOLOGY

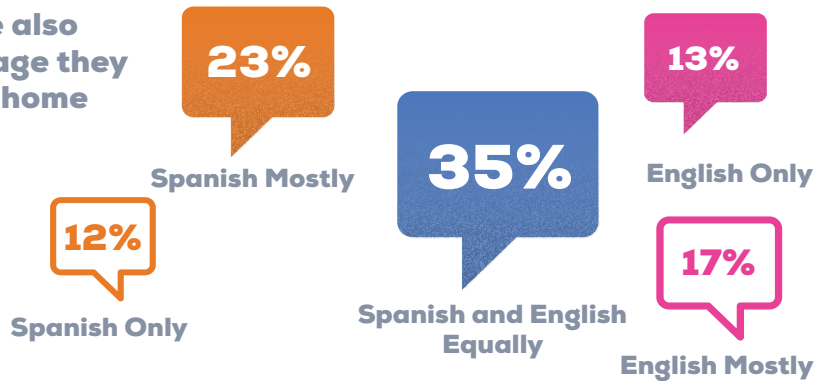
In March 2020, a national survey was fielded among 500 consumers, ages 18-64, who self-identified as Hispanic. They were representative of today's Hispanic market in terms of region, language proficiency, acculturation and country of origin.

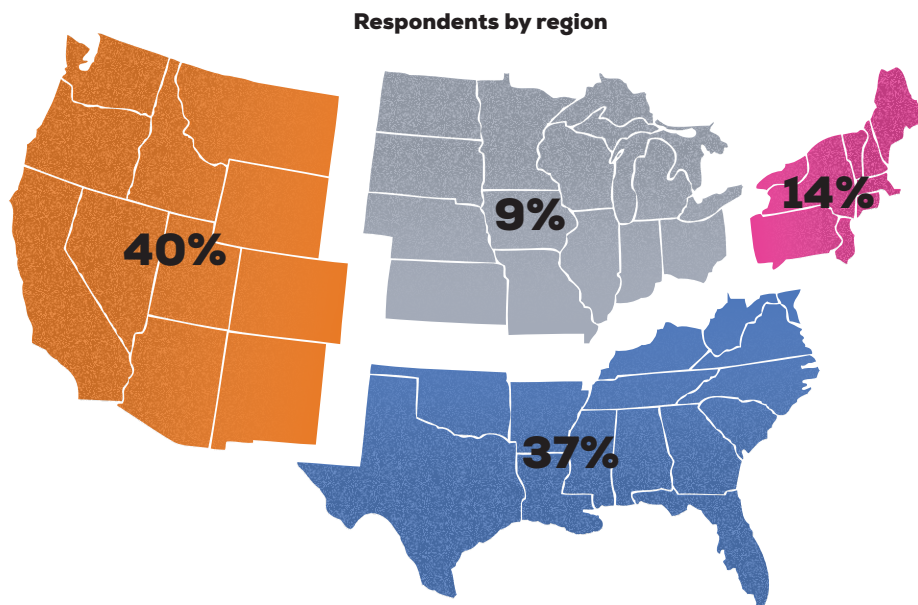
Language and country of origin

More than half the people taking the survey were U.S. born, but many more than that number opted to take the survey in English. This indicates that some of the respondents who were born outside of the U.S. most likely came to the U.S. before the age of 10, and that their primary socialization took place here (Generation 1.5).



Respondents were also asked what language they normally speak at home





Age, region and education

Respondents represented a diverse cross-section of ages and educational levels, from all regions of the U.S.

Media consumption

We asked respondents about the media they used, as well as the language of the content.

- **TV and radio** were named most often when it came to content in English and Spanish equally.
- **Print media**, including books, magazines and newspapers, was cited by just under half the respondents as a source for English Only or English Mostly content.
- **Digital media** consumption was in English Only or English Mostly for slightly more than half the respondents.

Interestingly, consumption of Spanish Only and Spanish Mostly print and digital content was very low. One reason could be that while many Hispanics are bilingual, they're not fully Spanish-language literate.

Another hypothesis? There simply isn't much Spanish-language content available online. It's an opportunity waiting to be addressed by astute brands.

	Internet	TV	Radio	Print
Spanish Only	5%	5%	5%	6%
Spanish Mostly	8%	10%	12%	11%
Spanish & English Equally	36%	42%	41%	34%
English Mostly	24%	23%	19%	22%
English Only	27%	20%	23%	26%



FINDINGS

In search, everything is relative

Search has become one of the most important tools brands have for being found and engaging their target audience online. That holds true for the Hispanic market as well. But as our research showed, there are important differences in how search is used.

First, we asked our Hispanic consumer respondents whether relatives who were not fluent in English ever asked them to go online and research a purchase the relative was interested in. An astounding 81% answered yes. And over half of those reported that this happened “regularly” or “fairly often”.

Where did these requests come from? The answers were surprising.

- 57% said that requests came from relatives **in their household**.
- 54% reported getting requests from U.S. relatives who were **not in their household**.
- 24% said they received requests from relatives **in another country**.

But differences also emerged when the data was broken out by *Spanish Dominant* Hispanics versus *Bilingual/English Dominant* Hispanics.

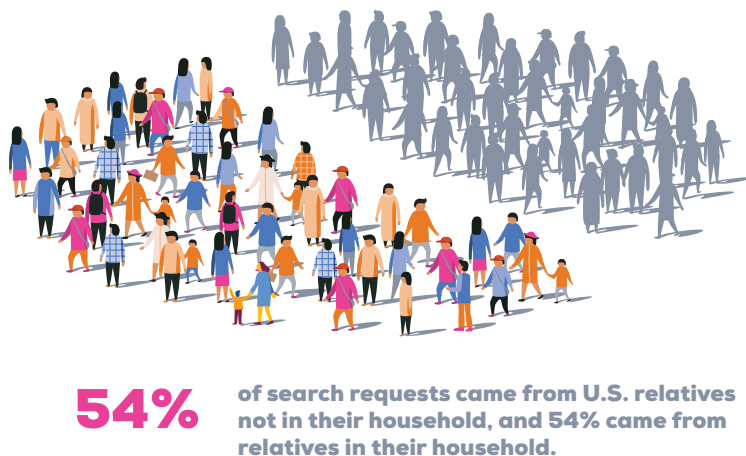
Whether respondents are *Spanish Dominant* or *Bilingual/English Dominant*, they’re regularly taking on the role of digital Sherpa for multiple relatives in a variety of locations.

Brands developing Spanish-language content or assets, take note: You may not just be engaging one unique Hispanic consumer – you may also be reaching their family members at home, in another state or even in another country.

For Spanish Dominant Hispanics



For Bilingual/English Dominant Hispanics



Can I help you?

Once we understand how common it is for Hispanic consumers to help members of their extended family research purchases online, the question becomes: Why? That is, what triggers those requests for help?

Once again, we found that language issues and comfort using the Internet played a part.

	Major Factor	Minor Factor	Not a Factor
Not comfortable doing research online	59%	31%	10%
Not fluent/don't speak English	61%	30%	9%

When responses were filtered through the lens of *Spanish Dominant* Hispanics versus *Bilingual/English Dominant* Hispanics, a slightly different picture developed.

	Spanish Dominant	Bilingual/English Dominant
Not comfortable doing research online	64%	56%
Not fluent/don't speak English	71%	55%

Language is the most common reason that *Spanish Dominant* consumers receive requests from relatives for help. For the *Bilingual/English Dominant* participants in our study, language and comfort online were nearly equal in driving this behavior.

Consider these findings when you're analyzing or designing your brand's digital presence. In addition to Spanish-language content, a user interface that's simple and easy to navigate is a plus for Hispanic consumers.

Don't overlook the fact that there are many more Hispanics online than just the digitally savvy millennial cohort. Brands that create an unthreatening digital experience for older consumers will find that those consumers will seek them out.

Search * 2

As they toggle between two languages, digital Sherpas have several ways to do research online when they help family members. We asked respondents to tell us where they conducted searches and what language they used.



- 52% mostly conducted research in **English or on English-language websites.**
- 25% researched in **both English and their relative's preferred language.**
- 23% mostly did research **in their relative's preferred language.**

When analyzed by language proficiencies, *Bilingual/English Dominant* consumers were more likely than their *Spanish Dominant* counterparts to do research on English-language websites (58% vs. 43%). Furthermore, the *Spanish Dominant* were more likely than the *Bilingual/English Dominant* consumers to use both English and Spanish to conduct research. Looking at the data by age, we found that for *Bilingual/English Dominant* Hispanics, the older our respondents were, the more likely they were to conduct their research exclusively in English.

Pursuing a dual-language strategy in both search and digital content will benefit brands looking for ways to engage the Hispanic market across acculturation levels.



GUIDEPOST 1: **SEARCH**

If your brand doesn't use a dual-language search strategy as a part of its marketing efforts, you may be losing half the Hispanic market before you even get started.

That's because only about half of Hispanic consumers are searching online in English, while the rest are using both English and Spanish, or Spanish alone.

In fact, according to Google (2018), over 30% of digital media consumption in the U.S. is by searchers who use Spanish and English interchangeably.

What can you do to engage them?

- **Utilize Spanish keywords on both English and Spanish browsers, and English keywords on Spanish browsers.**
- **Use 80% non-brand terms to 20% brand terms.**
- **And finally, include as many keywords as possible, including bilingual terms.**

Sharing content

What happens after the online research has been done, when information is passed on to relatives who may not be English speakers?

We asked respondents who conducted their research in English or on English-language websites to tell us how they shared content.

Spanish Dominant respondents were more likely to translate content verbally, while *Bilingual/English Dominant* respondents relied more on technology solutions, like Google Translate.

The older the *Bilingual/English Dominant* respondent was (ages 39+), the more likely they were to verbally translate information.

Overall, nearly eight in 10 Hispanic consumers need to verbally translate content for a relative. Brands can take advantage of this hidden opportunity to better serve these constituents online.

78%

reported that they **verbally translated content for a relative.**

27%

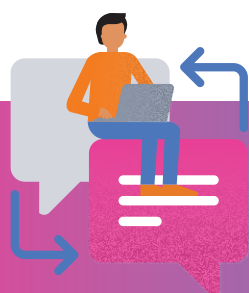
used **Google Translate or another translation service.**

16%

told us they **sent information to someone else to translate for a relative.**

15%

found and shared the information on **web pages in the relative's preferred language.**



GUIDEPOST 2:

TRANSLATE

Again, our research revealed that an overwhelming percentage of Hispanic consumers verbally translate website content for their relatives (78%).

The others use Google Translate or other tools, or rely on an individual to translate for them. It's both arduous and time-consuming.

Smart brands can radically simplify the process by having a translation tool handy and clearly visible on every page of their sites. The individuals who aren't translating, and are instead relying on technology such as translation apps, are the offline Sherpas in the Hispanic marketplace (the *Bilingual/English Dominant* cohort).

By lifting the burden of translation from the shoulders of the family's go-to shopper, brands will create a positive experience for both the shopper and the end consumer. Your brand will gain potential revenue – and loyal fans.



GUIDEPOST 3: **CREATE**

In today's global marketplace, it's safe to assume that consumers who interact with your brand online may come from a different culture and may not speak English fluently.

Not concerned? You should be. The Hispanic market makes up 20% of the U.S. population.

Creating Spanish-language content is a critical step for brands that want to reach these consumers and connect with them in an authentic, engaging way. A few things to consider:

- **Provide Spanish-language content** and use imagery that will resonate with your target.
- **Take a second look at your messaging hierarchy.** Is messaging tiered in a way that works for general market consumers, who usually do things on their own behalf, or for those who may be purchasing for a family member?
- **Make sure links drive consumers to Spanish -language pages.** If they don't, let the consumer know before they click – it will give them time to prepare and adapt to the language change.
- **Don't hide your Spanish -language button.** Keep it above the fold, where it'll be easy to see. Not only is it hard to find at the bottom of the page, but it may also send an unintentional message to the consumer that their needs aren't that important.

Who's making the purchase?

At the end of the path to purchase, we see real differences between the Hispanic market behaviors and the general market behaviors we may be accustomed to. We asked respondents to indicate who typically made the purchase once their research was finished.

50%

made the purchase for a relative, on an English-language website.

Roughly half answering this way were *Bilingual/English Dominant*, and half were *Spanish Dominant*.

19%

reported assisting relatives with the purchase on an English-language website.

23% of these respondents were *Bilingual/English Dominant*, 13% were *Spanish Dominant*.

18%

said they purchased on behalf of a relative, on a website in the relative's preferred language.

6%

assisted relatives with the purchase, on a website in the relative's preferred language.

Looking at the behavior of digital Sherpas who toggle between the two cultures as they help their relatives make purchases, the real differences between the Hispanic market and the general market become apparent.

The *Spanish Dominant* respondents – people closest to the culture of “community above self” – were more likely to buy on behalf of a family member.

The *Bilingual/English Dominant* respondents were more likely to assist their relatives in making a purchase. They understand the value of interdependence and family from the Hispanic culture, and the value of independence and self-reliance from the general American culture. Their duality and biculturalism inform their online behavior of assisting, but not purchasing on someone else’s behalf.



GUIDEPOST 4: **ONLINE REVENUE**

Find ways to help the digital Sherpa as they help their family. Or create Spanish assets that will empower those family members to do their own research. Either way, your brand can drive greater revenue online.

If your website doesn’t have an easily accessible **Spanish toll-free number or Live Chat in Spanish on every page, you’re missing out.**

During the purchase process, a live brand advocate provides an unmatched level of immediacy, instantaneous feedback and personal engagement. And because Hispanic consumers tend to be spontaneous buyers, having someone on hand to discuss the product and answer their questions in Spanish helps them feel good about their purchase decision. And remember that the Hispanic market values interdependence – it is a collective cohort. They will respond to brands that forge a direct, personal connection during interactions.

Chat and toll-free numbers also help you connect quickly. And when you’re accessible and responsive, **you’re letting your customers know that they matter.** On a purely practical level, you’re also giving them alternatives if translation tools aren’t working accurately, phone wait-times are long or they’re not in front of a computer.

Finally, design a simple shopping page that supports ecommerce transactions in Spanish. 69% of Hispanic respondents told us that they either buy products for their relatives outright or assist them in the purchase process.

In the end, you’ll engage customers who might not normally find you and make the job of the family digital Sherpa easier. The benefits? Positive word-of-mouth and increased customer acquisition.



GUIDEPOST 5: **SHARE**

You've simplified the online brand experience. You've found ways to make it relevant for your Hispanic customer. Now consider ways you can help them share that information.

It can pay a huge dividend, especially with *Bilingual/English Dominant* users who act as digital Sherpa, assisting family members outside the household. Imagine how much simpler their life would be if they could find the information they want to pass on, select the language it should be shared in and even decide what form it should take – email, text, etc.

Research shared this way immediately feels more credible. After all, it's coming directly from a trusted family member. Plus, the recipient gets the information in their own language and in a format they like, so consumption is easy and enjoyable. Finally, the entire process is quicker. No time is lost translating and interpreting content for another family member.

In this scenario, everyone wins. Including the brand.

CONCLUSION

The Hispanic consumer is part of a collective cohort that supports relatives online through every stage of an interaction with a brand – from search to content consumption to the final ecommerce transaction.

And at the heart of this experience are family members who play the role of digital Sherpas for the group. These consumers may be *Bilingual/English Dominant* or *Spanish Dominant*. They may act as information gatherers, as translators, as purchase assistants or as end buyers. Their support extends to relatives in their own household, outside their household and even outside the U.S. who aren't comfortable making online purchases or aren't comfortable with the English language or both.

Our research revealed that the lack of Spanish-language content across digital touchpoints puts an additional burden on these consumers, limiting a deeper engagement.

The opportunity is clear. Brands that address the needs of this group sooner rather than later – that shift their strategy to a “direct to collective” approach – stand to capture more of the expanding Hispanic market, across multiple generations.

THE BROADER IMPLICATIONS

While our research focused on the Hispanic market, many of the concepts we discovered are not absolutely exclusive to those consumers. Our query of Asian-Americans yielded some interesting results.

- 75% of the Asian-Americans we talked to also reported helping relatives who were not fluent English speakers with online research.
- These respondents said that relatives in the household and outside the U.S. were the ones they were more likely to help – similar to the *Spanish Dominant* Hispanic group in our survey.
- 66% of the Asian-American respondents reported doing research on behalf of their relatives in English or on English-language sites.
- A majority of respondents said they verbally translate the content for family members. The next most common way was to use online translation services, with 13% reporting that they simply shared the information in English (in contrast to 6% for our Hispanic respondents).
- 56% said that they typically make purchases on an English-language site on behalf of a relative.

These results provide a compelling argument that facilitating the digital experience at every touchpoint – for all multicultural consumers – will drive a greater return on investment and attract a uniquely engaged and devoted group of customers.

Learn how to drive exponential revenue and fandom from the total Hispanic market by speaking with one of our experts.

Contact Maria Twena, 9thWonder's Global Head of Consumer X at Maria.Twena@9thwonder.com





About ThinkNow

ThinkNow is a technology-driven cultural insights agency. ThinkNow enables companies and government agencies to discover the cultural drivers that influence consumer decisions. We provide insight solutions to help organizations thrive in a changing demographic environment. ThinkNow also owns and operates one of the largest and most representative Hispanic online panels in the industry, DigaYGane.com, used to service our research as well as provide samples to the leading market research companies in the world.

[Learn more at www.thinknow.com.](http://www.thinknow.com)



About 9thWonder

9thWonder is an independent marketing, media and ideas agency that brings together diverse thinkers and specialties from across seven offices (Houston; Dallas; Denver; Los Angeles; New York; Buenos Aires, Argentina; and Nha Trang, Vietnam) to identify hidden opportunities and develop lasting advantages for clients such as Honda, Natrol, Phillips 66 and Stage Stores. 9thWonder was founded in 2018 when agency entrepreneur Jose Lozano formalized a collective of successful independent agencies as one integrated enterprise.

[Learn more at www.9thwonder.com.](http://www.9thwonder.com)

