



LIONBRIDGE

# HOW TO WIN IN THE INDIAN MARKET WITH LOCALIZATION

THE ESSENTIAL GUIDE FOR ENGAGING CONSUMERS  
IN A NATION WITH 22 OFFICIAL LANGUAGES

## Inside, you will learn:

How enormous economic and technological growth is transforming India

Why the “English language first” maxim is rapidly becoming outdated

Why millennials may be more important in India than anywhere else

What to look for in a localization partner (hint: forget about freelancing)

# WHY LOCALIZATION IN INDIA?

*For business, opportunity beckons in India.*

Home to one of the oldest civilizations on earth, India is also an emerging market with hundreds of millions of upwardly-mobile consumers who are ready and willing to buy. A few facts:

- India is one of the **fastest-growing economies** in the world, with a **GDP that has grown** by at least 5% every year since 2012, and accounts for **15% of global growth today**
- By 2025, India will be the **world's third-largest consumer market**, with the largest middle class on the planet
- Growth in India is explosive, with a **4x increase in consumer spending** projected by 2030, fueled by an estimated **1 billion Internet users** at that time

And yet, unlike most other nation-states that are also economic powerhouses, India is not unified by a single common language. Rather, India is one of the most linguistically-diverse places on earth, with:

**22 official/  
major languages**

**122  
main languages**

**1,599  
dialects**

**13  
written scripts**

These are impressive (and perhaps daunting) figures. And they've prompted many marketers to try retrofitting a "simple" solution to the challenge of communicating with Indian consumers: Rely on English, the unofficial "language of business" in India.

But in reality, while English may still be an aspirational language for many Indians, **only 10% of Indians speak fluent English today**. Most Indians, like local people all over the world, prefer to learn about products and services and conduct transactions in their local languages. These are collectively known as the "**vernacular**" in India.

Quite simply, effective **marketers need to speak to Indian consumers in the local languages they use every day**. That's the WHY of localization. But with so many Indian consumers to reach, and so many languages spoken, **where should you start?** How can even the most ambitious translation and localization programs effectively reach such a varied target market?

Speak to every prospective buyer in their own language. First, take stock of the Indian landscape. Then, use your findings to create an effective localization supply chain.

## A SINGLE MARKETING MESSAGE, MANY INDIAS

You have a crucial product re-launch. You need to update your website in Hindi, Urdu, and Bengali. But you're also testing in southern India, so you need product labeling in Telugu, Kannada, and Tamil. Adding a last-minute test market? How about a TV ad in Marathi? It all adds up to a complex campaign, but localizing your content into these seven languages can be done—seamlessly.





## HOW LANGUAGE FITS INTO TODAY'S LANDSCAPE IN INDIA



### 1. In India, Digital is King

India has already surpassed the U.S. to become the world's **second-largest smartphone market**. By 2022, India will have nearly **700 million smartphones**. A low price of entry fuels this massive user adoption; many 4G smartphones are available for as little as **USD 65**, with correspondingly low data charges of approximately **USD 0.26** per GB per month compared to USD 12.37 in the US. Small wonder that at **9.8 GB** per month, India boasts the highest data usage per smartphone in the world.

The result is that mobile communications pervade India, even in rural areas that were previously isolated from regular communications, technological advancement, or inclusion in modern consumer society.

This new mobile reach—combined with the Internet's e-commerce and demand generation abilities—is turning hundreds of millions of formerly out-of-reach Indians into avid frontline consumers who eagerly devour product content.

These consumers are engaging in mobile e-commerce and e-transactions at an increasingly accelerated pace, using platforms such as Flipkart, Snapdeal, Amazon, and paytm. And, in a society that is still evolving from cash-based to cashless transactions, they are often using convenient e-wallet apps to seal the deal.

*What does this mean for your brand? It means the possibilities to engage an active consumer base in India are virtually limitless—provided you can speak these consumers' languages.*

Indian Internet users conversing in local languages on the web will total **536 million by 2021**, dwarfing the nation's English-first user base. And with digitally-influenced **consumption projected to double in India by 2030**—encompassing 40% of all purchases—the stakes are very high indeed.

So, embrace (and capitalize upon) the tech revolution in India. And that means embracing effective localization.



## 2. The Indian Consumer is Rapidly Evolving

Just as urban India and rural India have begun to converge—and are now sharing affinities for many of the same brands, aspiring to similar standards of living, and making similar technology-driven purchases—so, too, are other major changes sweeping through Indian society and altering buying patterns. These include:

- **The rise of the middle class.** The middle class is strong and getting stronger. Today, roughly **50% of households** in India fall within this category, according to local income and consumption standards. That number is expected to **rise to 80%** by 2030, with the middle class driving **75% of consumer spending**. That speaks to the power of upward mobility in India. It's worth noting, however, that the definition of "middle class" is broad and ranges from street vendors whose "big ticket" purchases are smartphones and televisions to upper-middle-class technocrats who buy luxury items such as automobiles.
- **The Millennial and Gen Z phenomenon.** These are the consumers whose tastes will continue shaping the world as we know it. Today, the **440 million Millennials in India and 415 million in China** make up **nearly 50%** of the world's Millennial population. By 2030, a staggering **77% of Indians** will be Millennials (born in the late 1980s and after) and Gen Z (born after 2005).

Beyond their sheer numbers, this group's tech-savvy consumption helps make markets. As a societal group, they are rabid users of the Internet and social media. Millennials have made these channels key sources of information regarding consumer purchases. They are knowledgeable buyers who can quickly discern between what they want and what's being offered. They are *not* to be underestimated.

Of course, the two categories—middle class Indians and up-and-coming Millennials—are not mutually exclusive. But both groups point to a newly-emerging reality:

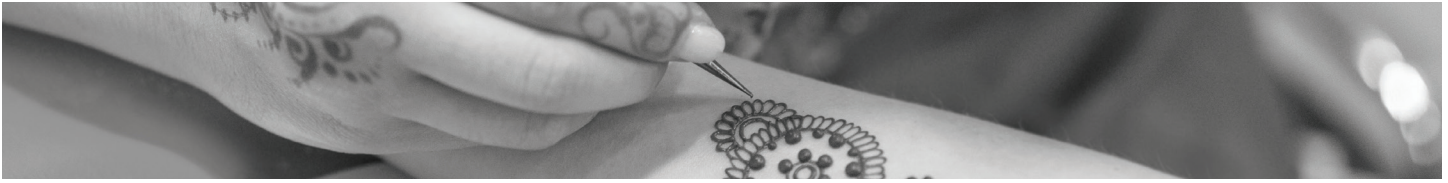
Whereas the ages and incomes of buyers have traditionally been drivers of Indian consumption choices, now the deciding factor is often a buyer's access to digital/online media through his or her Internet connection and/or smartphone. The more connected the consumers, the more likely they are to make educated purchases, upgrade to premium products, and demonstrate brand loyalty.

**But, because these consumers are so particular, they force you to ask a fundamental question: if they can't count on your company to give them product and service information in their local language, will they then turn to a competitor who can?**

### WOMEN IN INDIA: KARTA AT LAST

*With the rise of Indira Gandhi, India was one of the first countries in the last century to have a female head-of-state. But in general, women have traditionally not been primary decision-makers in the commercial marketplace. Today, that is changing. Women now have the legal right to be the "Karta," the Hindi name for a head of household. And both married and single women are now **independently making purchases** that used to be reserved for men, such as buying homes and automobiles.*





### 3 • English-Language Dominance is a Misconception

Old myths die hard. It's easy for marketers around the globe to assume they can "get by" in India with English-only marketing campaigns. To a degree (a very limited degree), these marketers can make something of an impact using English alone. But to tap the true potential of the Indian market—to genuinely succeed in India—one must shed the illusion that the Queen's English is sufficient to get the job completely done and done well.

To reiterate an earlier point: out of a total population of 1+ billion, only about **10% of Indians can speak English fluently** as a second language. Even then, they prefer to consume information at home or on-the-go in their local language.

In fact, surveys tell us that as more and more Indians gain Internet access, **90%** of them expect content to be presented to them in their local language. And **70%** of respondents consider content in their local language to be more reliable than English-language content.

Furthermore, in a poll of traditional Indian offline shoppers, a **full 50%** said they'd switch to an online channel if it presented content in their local language, rather than in English.

Clearly, localization is essential. But at what scope? Let's look at India's linguistic diversity a bit more closely—not only the breadth of languages spoken, but also the reasons these linguistic differences matter so much to everyday Indians.

### 4 • India's Linguistic Diversity is an Emotional Social Reality

The numbers reflect the linguistic challenge: **22 major languages in India**, 122 main languages spoken by more than 10,000 people, and 1,599 dialects—many of which are represented in written form by a full **13 written scripts**.

These numbers are impressive. But they don't convey the powerful emotional forces that drive the country's linguistic diversity.

India's 29 states have had their geographic boundaries set along linguistic lines. People in the state of Bengal speak Bengali. Assam residents speak Assamese. Kashmiris speak Kashmir. And so on.

But that's not to say these are the only languages spoken in these respective states. In many instances, inhabitants of a given state speak multiple languages.

The linguistic divide often reflects ethnic and historical differences within India that stretch back much further in time than the histories of many Western nations. Even though an individual Indian may speak more than one local language (and possibly English as well), she may prefer to speak and read in her mother tongue only, for reasons of local pride. And she may take offense to people who try to impose their language on her.

A serious national debate currently taking place in India on the use of Hindi—India's most commonly spoken language—brings these sensitivities to light. While Hindi is in fact the official language of the Government of India, it is not seen in many quarters as the "national" language, and its perceived "imposition" on the daily lives of non-Hindi speakers is a source of continuing controversy.

It's no surprise, then, that with such emotionally powerful elements at work, the linguistic preferences of an Indian consumer can play a huge part in his or her consumer choices.

But global businesses can navigate this complex linguistic landscape and maximize market penetration in the vibrant and growing Indian market. They can do that by localizing products, services, and content—and in the process, meeting the needs of hundreds of millions of Indian consumers who are most comfortable when communicating in their own local language.

Think about it this way. Can you really afford not to localize when you consider that:

- By 2021, there will be **201 million Hindi-speaking Internet users**, outnumbering all in-country Indians who speak English fluently
- In the same year, **Bengali, Marathi, Tamil, and Telugu** users will constitute 30% of the Indian language user base
- Today, **Hindi is the fourth-most spoken language in the world**, Bengali is seventh, and Punjabi is 10th
- By 2050, Hindi, Bengali, and Urdu will all be **in the top five languages** spoken globally

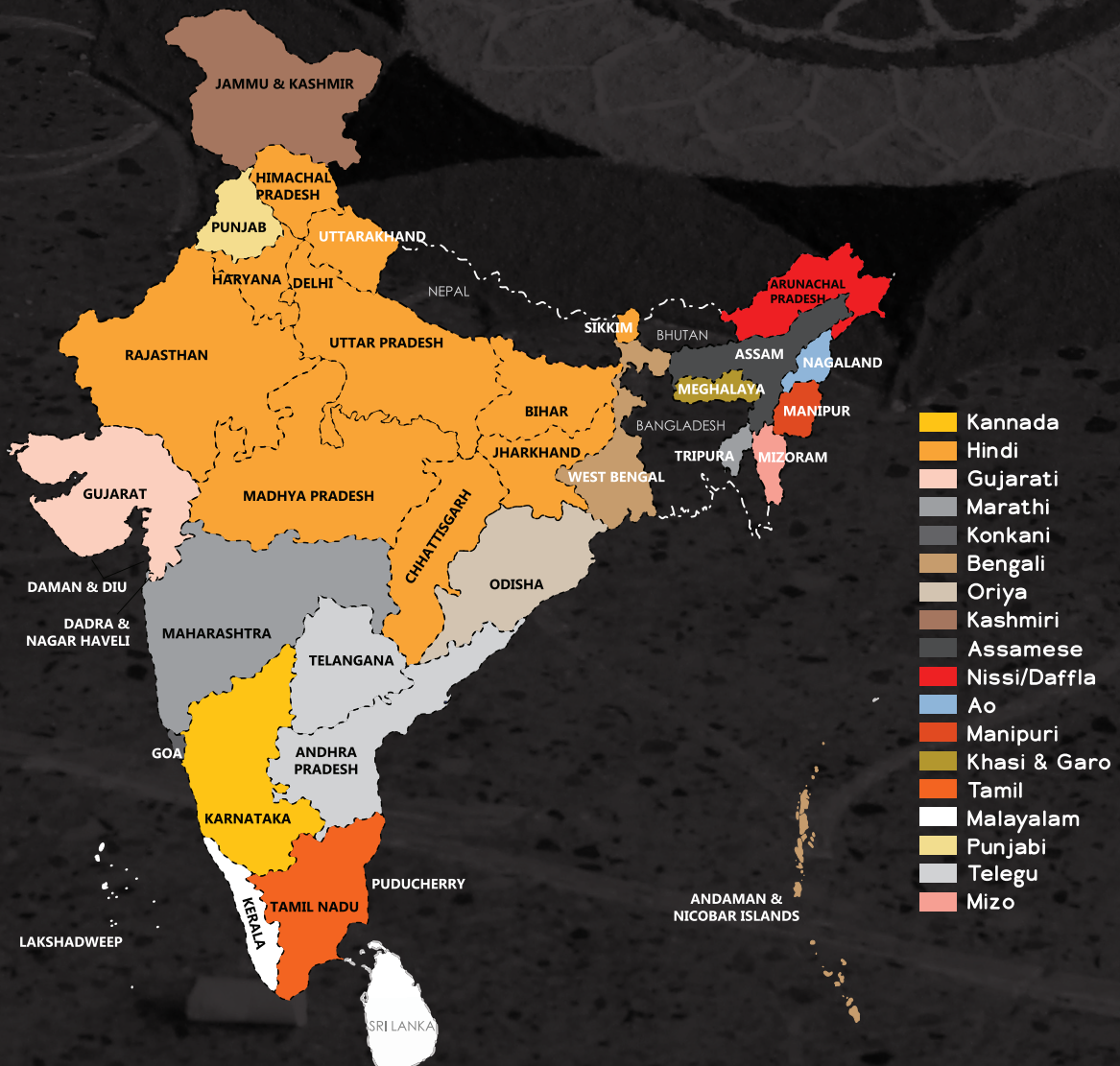


## THE 22 “SCHEDULED” LANGUAGES OF INDIA:

*The Constitution of India does not confer the status of “national” language on any of the languages spoken in the country. Rather, it refers to 22 languages as “scheduled” languages officially recognized by the Government of India.*

*These languages are:*

Assamese | Bengali | Bodo | Dogri | Gujarati | Hindi | Kannada | Kashmiri  
Konkani | Maithili | Malayalam | Marathi | Meitei | Nepali | Odia  
Punjabi | Sanskrit | Santali | Sindhi | Tamil | Telugu | Urdu





# IN THIS LANDSCAPE, HOW CAN YOU GAIN A COMPETITIVE ADVANTAGE?



## *Establish an Indian localization supply chain.*

**W**ith such a diverse range of languages in India, how can businesses best move forward when trying to assemble a translation and localization team?

Certainly, companies have attempted freelance models in Indian markets. In this model, companies have hired moonlighting academics to provide translations—a practice that tended to produce overly-formal translations that often failed to capture the vibrancy or consumer-catchiness of the marketing message in its original language.

Furthermore, managing freelancers has often proved cumbersome, both in terms of logistics and quality control. Translating text into multiple languages among multiple teams further complicated the process.

And finally, working exclusively with freelancers poses a technology question. In instances when your translations do not necessarily have to be completed by humans—a customer service chatbot in Hindi or Tamil, for example, can be effective—is your organization able to take advantage of the latest advantages in artificial intelligence (AI) and machine translation (MT)? The pace of advancement is brisk: does your localization team have access to the technology required to help you maximize the quality, speed, and economy of your efforts?

In many instances, your company has an alternative to the freelance model: build an in-house localization team. However, as you might expect, or have perhaps experienced, creating a from-scratch team can be a cost-prohibitive exercise that consumes enormous time and resources.

Fortunately, there is another way: find a qualified localization partner that can serve as the key link in your Indian localization supply chain. The ideal partner can provide proven strength for *every* link in the chain by offering you:

- **Years of experience** in global multilingual marketing campaigns, including market-leading experience in specific Indian markets
- **A full range of localization services**, from translation and transcreation (transforming a global message to suit the local culture) to copywriting and vocalization—all of which effectively capture local nuances, idioms, and dialects
- **Translation technologies** that put the best of AI and ML/MT to work for you (case in point: Google's reliance on neural machine translation to provide top-quality contextual translations between English and 13 Indian languages, all supported by human-like speech)
- **Complete scalability** to handle any program in the second-most populous nation on earth (India is projected to be the **most populous by 2024**, when it will likely overtake China)
- **Vertical market expertise**, whether you need a personal finance app translated into Hindi or a video game localized for Malayalam and Urdu speakers
- **Technology integration** that connects the tech platforms in which you've already invested to the translation and localization services you'll be using
- **Access to continuous coaching** from a partner who can serve as your confidante, answer any questions you may have, and be your trustworthy, long-term advisor as you localize for Indian markets

These capabilities need to meet an overriding challenge in communicating with Indian consumers: As you go from state to state and language to language in India, you will notice that customs, idioms, and cultural elements change.

*You need a linguistic partner who can not only translate accurately, but who can also capture the unique meanings and frames of reference that differ from region to region within India.*

## AN EXPERT'S TAKE ON THE INDIAN CONSUMER AND LOCALIZATION

*A few observations from Sarath Divella,  
Country Head for India for Lionbridge:*

### **The search for functionality:**

*“Many Indian consumers buy based on functionality. They’re not status-conscious customers who are trying to show off or display their watch, phone, or any other items. They’re people who need the function of the product and then use it. It’s a very practical way to buy.”*



### **Setting a localization priority:**

*“A business person who comes to India may wonder where to start with their localization effort. Which languages are most important in terms of translation? Where should emphasis be placed? I think it’s a simple equation. Hindi is the most spoken local language in India, so you start with Hindi.”*

### **The mobile generation:**

*“When you look at many Indians in the 25-35 age range, we’ll call them the ‘new generation,’ they consume virtually all of their content and conduct transactions via their mobile phone. They’ve skipped over the whole idea of owning a physical desktop or laptop computer. They don’t fit the stereotype of people who own lots of devices. They often have one device and one only: their mobile phone.”*





## LEARN ABOUT LIONBRIDGE'S RECORD OF SUCCESS IN INDIA.



As you look for a localization partner that can help you succeed in the multilingual Indian market, consider Lionbridge. We're a localization pioneer in India, and today, we're the biggest and most accomplished organization providing translation services on the sub-continent. We offer you:

- **Human translation talent** that includes more than 100 Indian-born translators, backed by our worldwide staff that numbers in the thousands
- **Technology breakthroughs** that we invented, such as our linguistic toolbox for quality control, and our Machine Translation Quality Metrics for gauging MT accuracy (all in addition to “tech essentials” such as our tech stack integration, which helps you protect and leverage your investments in your current platforms and applications)
- **An established linguistic supply chain** that covers you at every stage of the localization process, from content intake and translation to downstream review and approval, and updating of style guides to ensure consistency and continuous improvement

These capabilities have proved helpful to our global clients—some of the largest and most innovative companies in the world—doing business in India.

But it's not just industry giants we help. It's companies of all sizes. And in every case, our philosophy is simple: There may be 22 official languages in India, but for you, with the right localization assistance, the possibilities for communicating effectively and persuasively are limitless.



## About Lionbridge

Lionbridge partners with brands to break barriers and build bridges all over the world. For more than 20 years, we have helped companies connect with global customers by delivering marketing, testing and globalization services in more than 300 languages.

Through our world-class platform, we orchestrate a network of 500,000 passionate experts in 5,000-plus cities, who partner with brands to create culturally rich experiences. Relentless in our love of linguistics, we use the best of human and machine intelligence to forge understanding that resonates with our customers' customers. Based in Waltham, Mass., Lionbridge maintains solution centers in 27 countries.



LEARN MORE AT  
[LIONBRIDGE.COM](https://www.lionbridge.com)

**LIONBRIDGE**

© 2019 Lionbridge. All Rights Reserved.