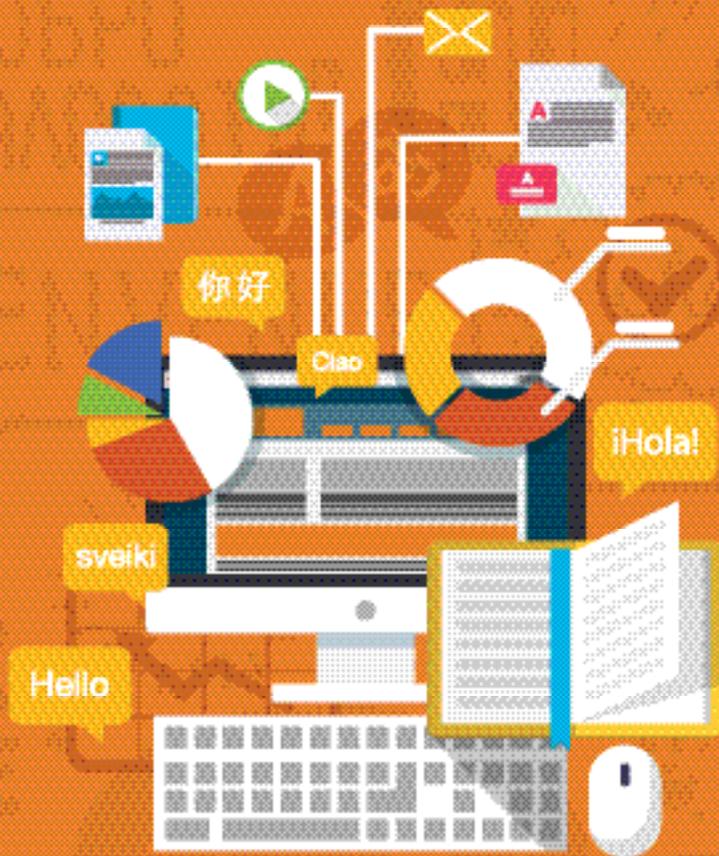


2015 State of Website Localization Report



Introduction

Global brands have embraced a multichannel approach to attracting, engaging, and growing customers. Many have also adopted a global-local philosophy, imbuing brand messaging with local nuance to deliver personalized experiences.

Their digital properties—especially their websites— are pivotal to this effort. However, offering a native language web experience to global visitors has been a challenge for many brands.

Today there are multiple options for website localization. Cloud-based technologies, sophisticated translation engines, and industry consolidation have resulted in a robust localization market. Crafting a multilingual website is now within reach of many brands.

So to what extent are brands transforming their websites to connect with global customers?

We asked global business professionals to tell us what they're doing to speak the language of their worldwide customers. Over a four-week long period, more than 200 participants from 31 countries completed Lionbridge's 2015 State of Web Localization Survey. We invite you to share in their insights.

Summary of Findings

The Lionbridge 2015 State of the Web Localization Survey, asked respondents to describe their web localization efforts, including: localization strategy, quantity of languages published, what content they choose to localize and how frequently they do so, and preferred CMS platforms. Additionally, we wanted to know who has primary responsibility for publishing localized content, their biggest challenges, and near-term expansion plans.

For our respondents, customer engagement is driving localization. The majority of participants are localizing their websites, and they're doing so in the name of customer service and brand consistency:

- **More than half (62.3%)** of organizations take a strategic approach to website localization
- **Their strategic drivers** were overwhelmingly **customer experience (82.6%)** and **brand consistency (67.4%)**, broadly outpacing content reuse (43%) and cost (37.2%)

More than 60% of respondents take a **centralized approach** to localization, **and responsibility for localization falls to Marketing in over half (53.5%)** of the firms surveyed.

Translation quality (55.8%) was the top website localization challenge, followed by **cost (41.9%)**, **materials prep (32.6%)**, and **cultural considerations (27.9%)**.

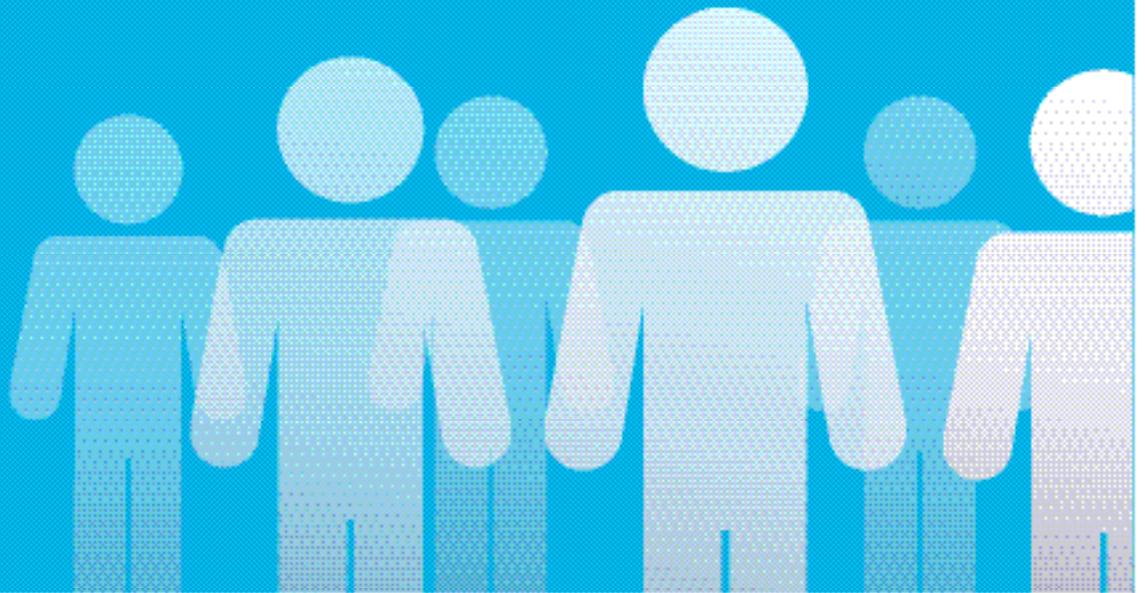
The majority of this year's survey respondents are pursuing a website localization strategy; **however, nearly 40% are still without strategic approach, representing a substantial area for growth**. For those who localize, there is no typical website localization experience—companies vary widely in how, what, and who localizes content. What they do have in common is the need to develop and deliver fresh, high-quality, relevant web content that supports their brand and enhances customer experiences.

Additional findings of note:

- + 5 or fewer languages: 44% of organizations who localize target five or fewer languages
- + Customer content is key: Over 90% of respondents localize customer-focused content such as solution/product information web pages
- + Ongoing need for content: 39.5% need content localized weekly
- + Broad range of CMS platforms in use: there was no stand-out web publishing platform named
- + Mixed expansion plans: Less than half (44.2%) are planning on expanding into new markets in the next three years

“A localized website, with good content in the customer’s language, is key to ensure the customer is continually engaged with your brand and your products and services.”

— Connor Robinson
Solution Architect for Lionbridge



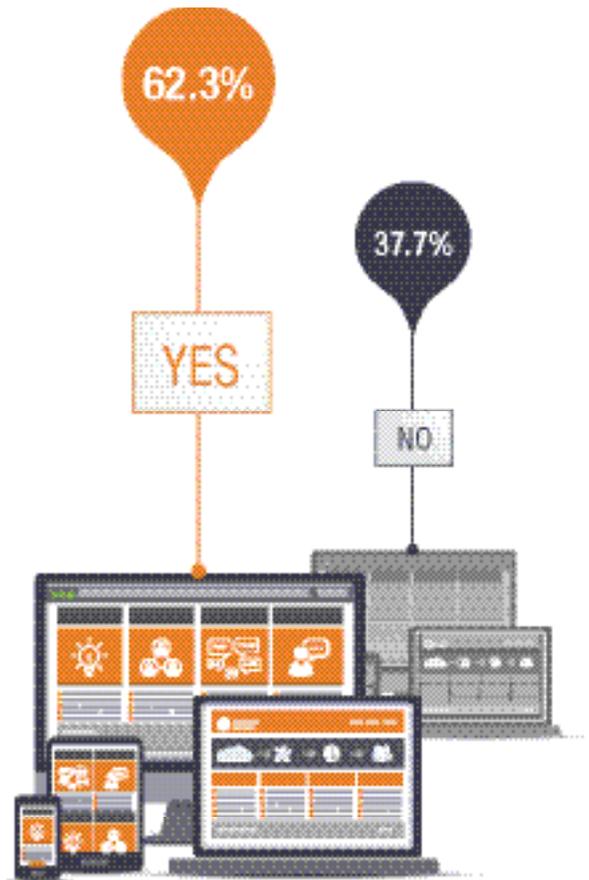
Survey Questions & Responses

Question 1: Does your company have a website localization strategy?

Takeaway: Survey respondents indicated that the majority have a localization strategy. However, with almost 40% of companies still without a website localization strategy, there is room for improvement.

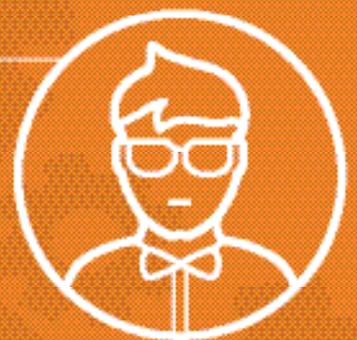
It is difficult to find the balance between global and local messaging. Determining where localization efforts should be placed adds another layer of complexity to website development and management. But the 40% without a strategy risk getting left behind by their peers who are treating localization as a business imperative, elevating localization's profile and increasing the level of formalization required.

Companies may choose to pursue localization without a formal strategy but, in order to meet specific goals and challenges, a strategic approach is necessary to direct, measure, and adjust localization efforts.



Expert Insight

“This data shows that most companies continue to be focused on the benefits that a truly global web presence can bring to organizations. Buyers are now researching and educating themselves on your products and services through engaging content that is in their own language. A localized website, with good content in the customer’s language, is key to ensure the customer is continually engaged with your brand and your products and services.”



Connor Robinson
Solution Architect
for Lionbridge

The following questions (2-11) are responses from the 62.3% who indicated they have a strategy in place—from target markets to the company localization process.

Question 2: What are the drivers for your localization strategy? (check all that apply)

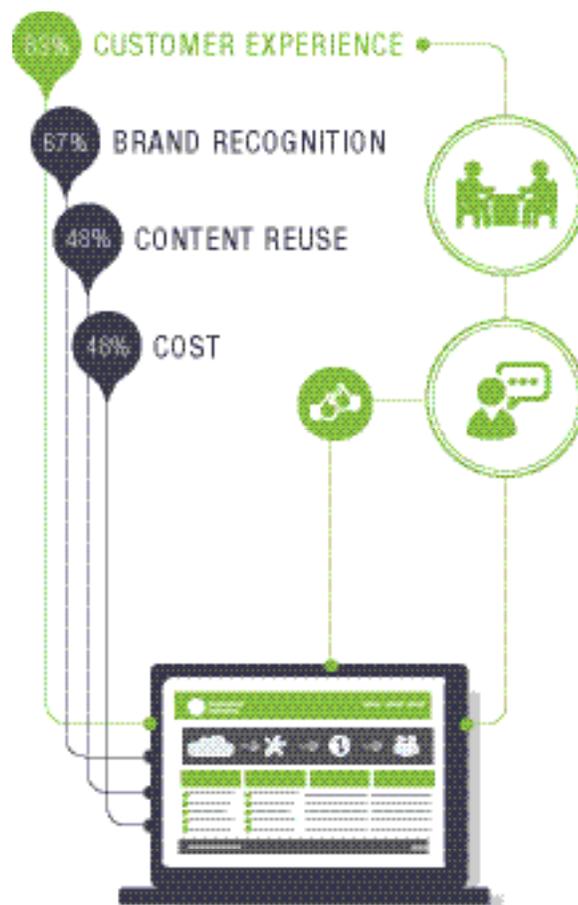
Takeaway: Survey respondents overwhelmingly selected Customer Experience as a key driver for their localization strategy, followed by Brand Consistency, Content Reuse, and Cost.

For the past decade, marketers have been focused on shaping and enriching customer journeys and making brands personal. Communicating with someone in their native language is paramount for personalization. Users develop a higher level of comfort and trust when presented with content they fully understand, and companies can use the analytics from visits, purchases, and social shares to further personalize the brand experience.

Brand consistency can be a victim of ad hoc or locally managed localization, as content managers may undermine brand guidelines in an effort to reach local audiences. Centralized localization efforts (as explored in the following question) go a long way in preserving brand look and feel while allowing for regional preferences.

Content reuse is a hot button for all marketers, not just those who localize. Redeploying content across channels and languages saves time, money, and resources. Localizing the “best of” content across markets is a clear best practice for many.

Cost is a driver for over one-third of localizers. However, the multitude of translation options available, from automated machine translation (MT) to high-quality human translation, allow companies to decide on their translation method to meet cost constraints. Question 11 examines attitudes toward translation quality and localization.



Question 3: How are localization requests handled today? (Select all that apply)

Takeaway: 61.6% of respondents have centralized their localization efforts. For the balance of respondents, almost 40% identified their organizations as having a decentralized approach to managing localization, including ad hoc efforts (12.8%) and/or agency-managed (7%).

The previous question identified customer experience, brand consistency, and cost as key localization strategy drivers.

Centralization greatly contributes to consistency in user experiences, brand representation, and minimizes costs and duplication of effort. It also supports content reuse, identified as another localization driver. Given the right suite of marketing tools and language partner, a small centralized team can have a global impact. Adoption of cloud-based CMS tools (see Question 6) also tends to support the brand, user experience, and cost savings elements of centralized localization management.

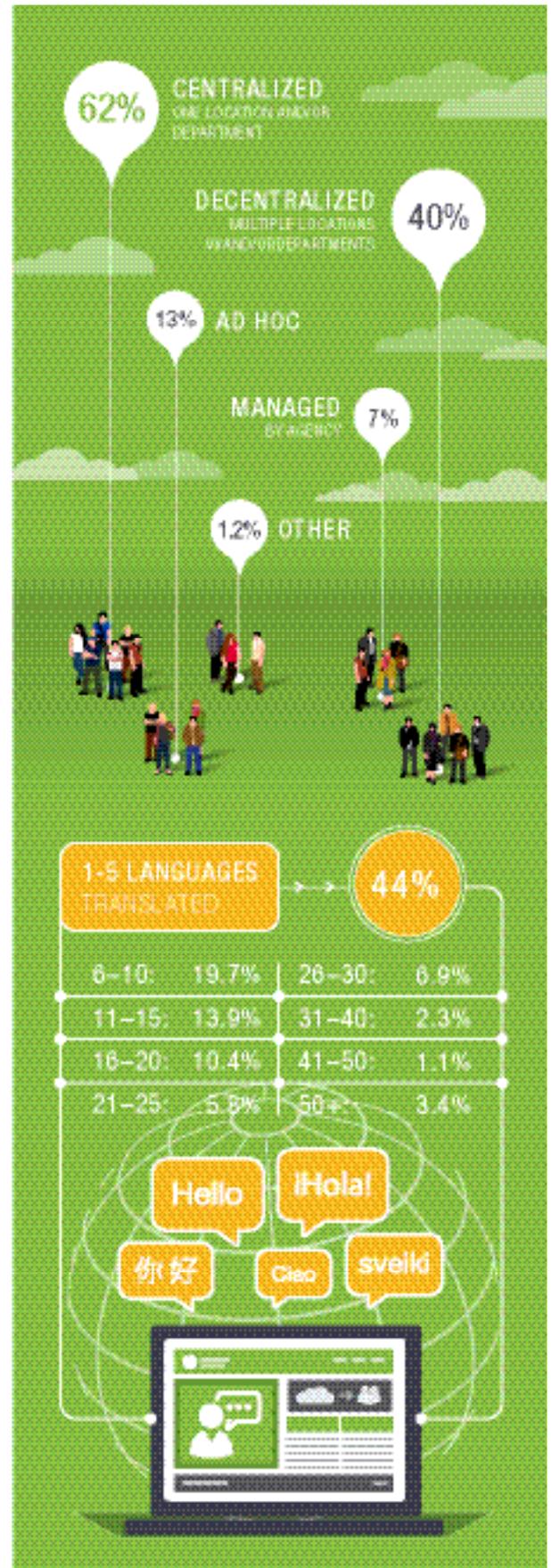
Question 4: How many languages do you translate your website into?

Takeaway: More than half (55%) are translating ten or fewer languages, with two as the most prevalent number translated, followed by one, three, and four languages respectively.

When asked how many languages they are translating their website into, respondents returned a broad range of responses, from one to 144.

For the 44% translating 11 or more languages, 15 and 20 languages were the most frequently cited by survey takers.

Based on current Internet user statistics, right now it takes ten languages to reach 84% of internet users. According to Internet World Stats, as of 2013, the top online languages are: English; Chinese; Spanish; Arabic; Portuguese; Japanese; Russian; German; French; Malay.

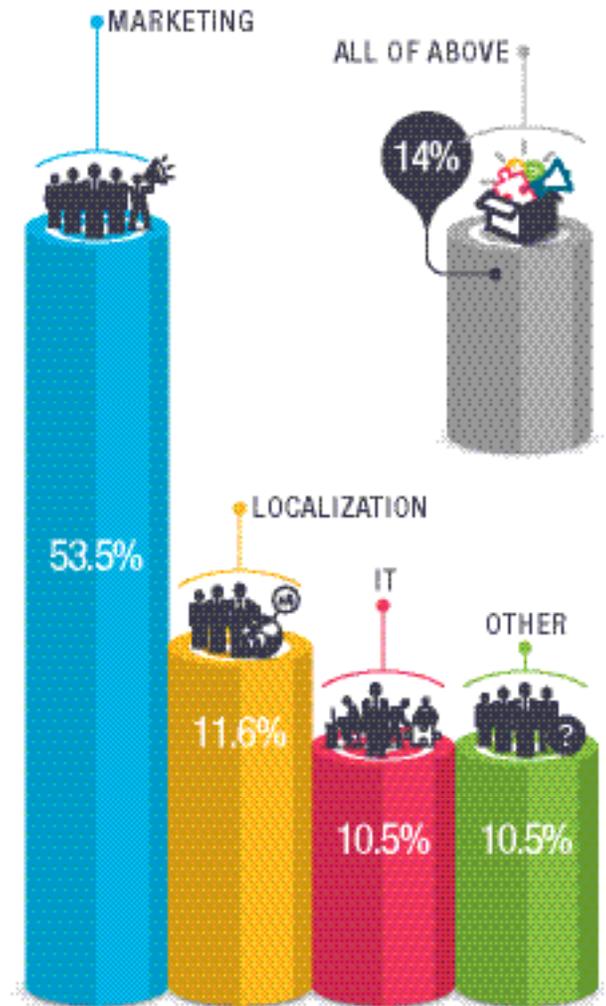


Question 5: What team or department is responsible for localizing websites?

Takeaway: By a large margin (53.5%), Marketing has responsibility for website localization among our respondents.

Following Marketing, 14% of respondents selected **All of the Above**—Marketing, IT, Localization, and others—a cross-functional group of stakeholders and contributors.

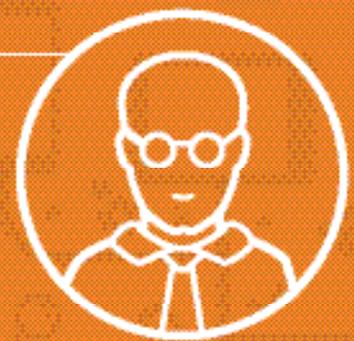
Localization (11.6%) and **IT (10.5%)** and **Other (10.5%)** follow. The Other (10.5%) response group included corporate communication, digital groups, and outsourced management.



Expert Insight

“Marketing departments still hold the lion’s share of the responsibility when it comes to web localization, but the landscape has become much more technical than before.

Today, client teams need to sort through the clutter of digital marketing and the ever-growing list of platforms and tools that are added to the mix, all while trying to elevate their customer experience and brand awareness via their global websites.”



Gabe Rodino

Lionbridge
Solution Architect

Question 6: What CMS platform do you use? (Select all that apply)

Takeaway: The most-used systems are Wordpress (22.1%), Microsoft Sharepoint (17.4%), and Adobe Experience Manager (CQ5) and Sitecore at 15.1% each.

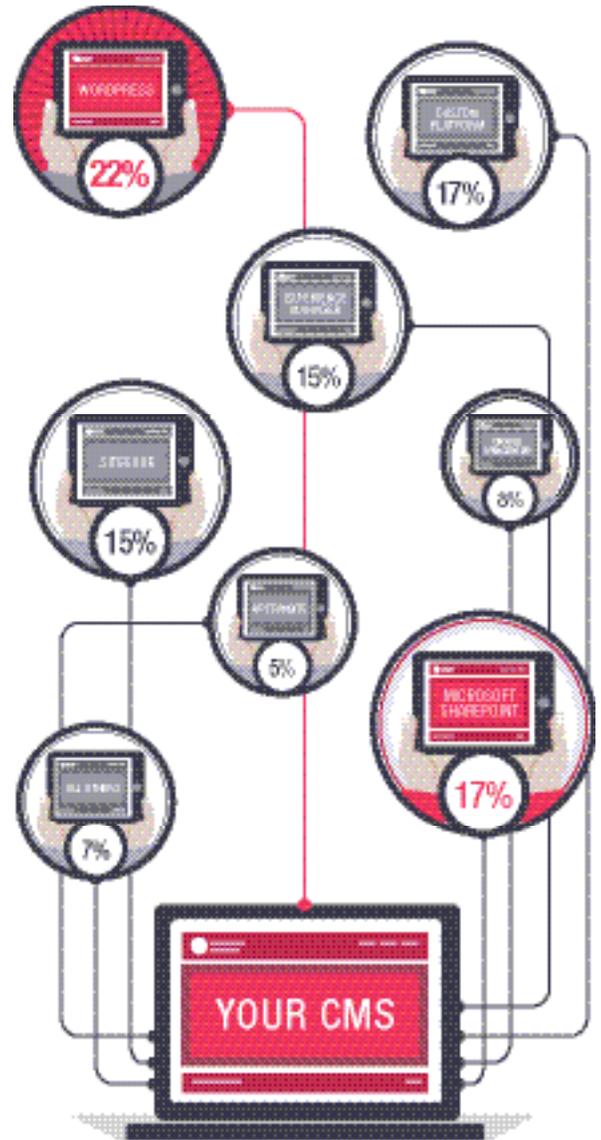
In this question, respondents were able to select multiple responses, but did not clarify CMS use per market or users. Companies may be using multiple systems for markets or audiences, such as Adobe for external content and SharePoint for internal users.

There are many content management systems to choose from and respondents have made use of their options, indicating their preferences from 12 named systems and as many write-ins. The biggest names in multilingual-friendly systems came in toward the middle of the pack.

The most-used systems are **Wordpress (22.1%)**, **Microsoft Sharepoint (17.4%)**, and **Adobe Experience Manager (CQ5) and Sitecore at 15.1%** each.

The top group was followed by Oracle WebCenter and Drupal at 8.1% each, SDL Tridion (5.8%), HP Teamsite (4.7%) named by multiple respondents.

Custom platforms accounted for 7.3% of systems used.



Question 7: What is the most important aspect of website localization for you?

Takeaway: Survey Quality/Accuracy (39.5%) was the top response, far exceeding Price/Cost (8.1%) and Turnaround Time (2.3%).

When asked to name their most important aspect of web localization, the leading answers—Quality/Accuracy and Customer Experience—underscore the participants' key localization drivers (Question 2) of customer experience and brand consistency.

Quality/Accuracy (39.5%) was the top response, far exceeding **Price/Cost (8.1%)** and **Turnaround Time (2.3%)**, two frequent translation and localization metrics. Following Quality is **Customer Experience (33.7%)** and **Driving Incremental Revenue (11.6%)**.

For respondents, it is not enough just to translate or localize, it must be done well, regardless of number of languages. With improved accuracy comes consistent customer experiences; increased customer engagement and incremental revenue are likely to follow.



Expert Insight



“Often, to contain costs, companies who are just going global will let in-market partners/distributors handle localization (which may mean that someone in the office will try to do it in their spare time).

A full-service LSP understands that clients need “different horses for different courses” and will adapt their approach to achieve the appropriate quality in the translations.”

—Walter Smith, Lionbridge Solution Architect

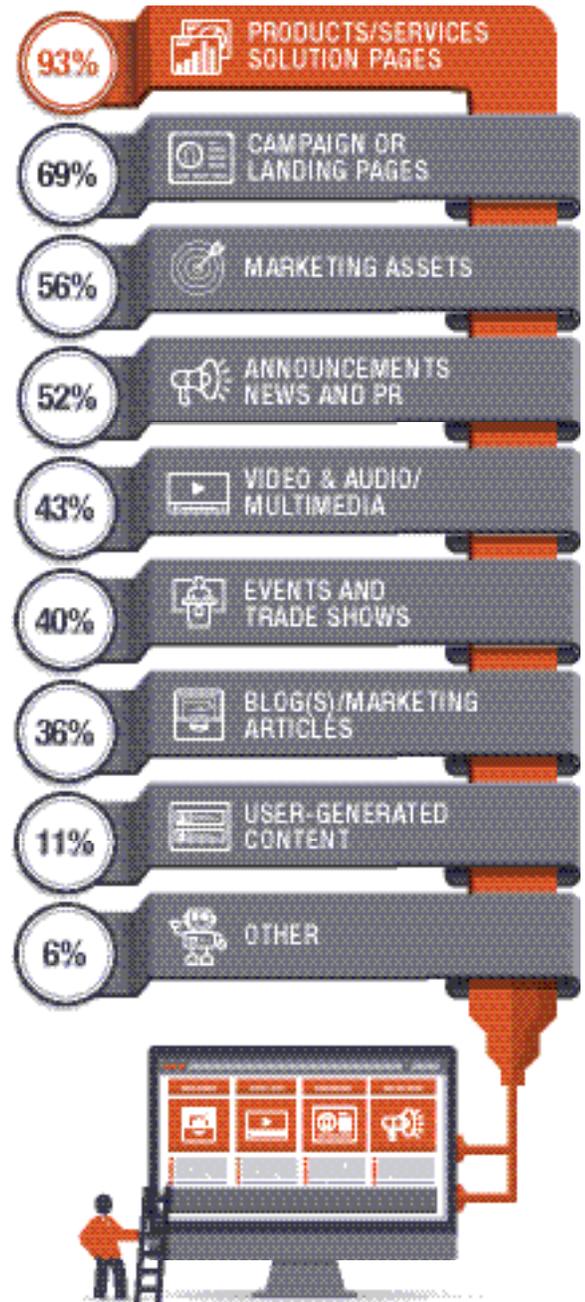
Question 8: What types of content do you localize? (Select all that apply)

Takeaway: Respondents overwhelmingly cited their Product/Service/Solution pages (93%) as the top content for localization.

In pursuit of optimizing the customer experience and driving revenue, respondents overwhelmingly cited their **Product/Service/Solution pages (93%)** as the top content for localization. **Campaign/Landing Pages** were named by **over two-thirds (68.6%)**, and data-rich **Marketing Assets (55.8%)** including ebooks, solution briefs, and white papers rounded out the top three.

SEO-friendly **News and PR (52.3%)** and social-friendly **Video and Multimedia (43%)**, **Events (39.5%)**, and **Blogs (36.1%)** rounded out the types of content participants choose to localize.

Ten percent of respondents also localize User-driven Content, including support and wiki pages. Content in the Other category includes legislation, learning content, apps, and user manuals.



Expert Insight

“Earlier in the survey respondents indicated that customer experience was a top driver for localization (82.6%). Most global companies consider the full lifecycle of the customer – pre-sales, buying, and post-sales. It’s important to remember the post-sales customer support content that makes a concrete difference in customer satisfaction scores. Benefits aren’t just limited to an increase in the CSA scores; localized content can serve to divert calls from CSRs to the website, for significant potential cost savings.”

—Walter Smith, Lionbridge Solution Architect



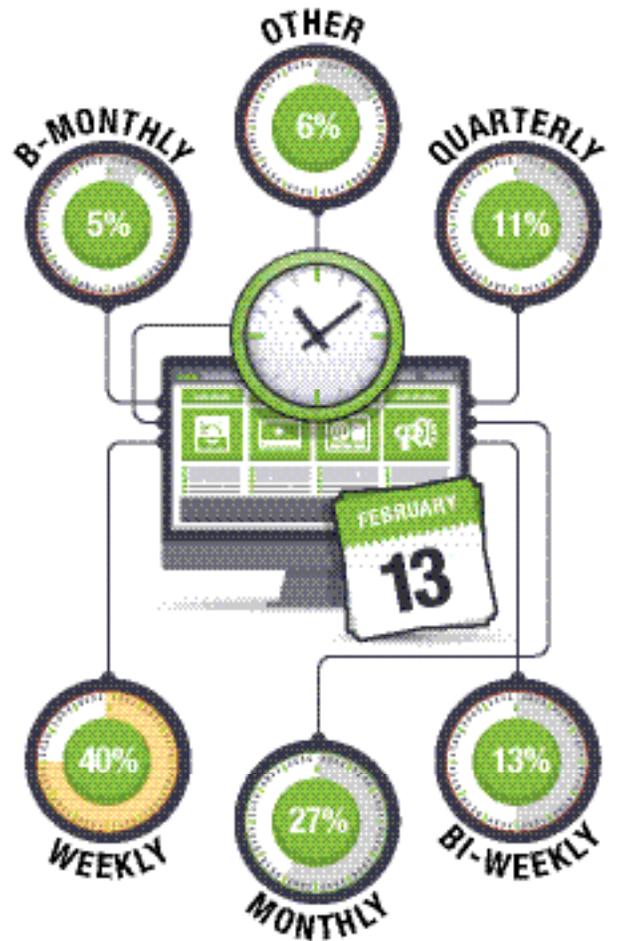
Question 9: How often do you need content localized?

Takeaway: Nearly forty percent of respondents need content localized weekly (39.5%), and another 26% need it monthly.

Nearly forty percent of respondents need content localized **weekly (39.5%)**, and another **26% need it monthly**.

Just over **12% of respondents need biweekly localized content**, and **five percent need it bimonthly**. Ten percent have a **quarterly need**, but **3.4% need fresh localized content daily or several times a week**.

Organizations who are able to master content reuse across languages will have a much easier time keeping up with demands for new and relevant content. Cloud-based content management systems, integration technologies, and translation tools make frequent content localization easier and faster.

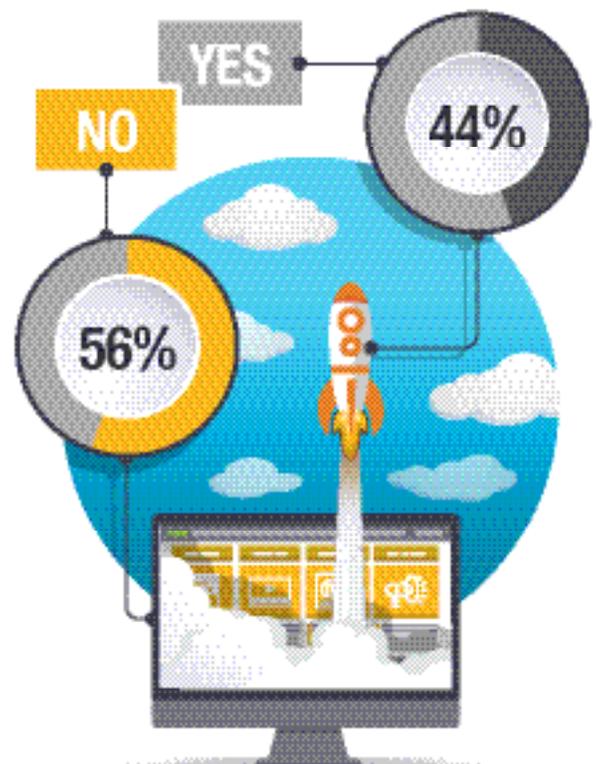


Question 10: Are you looking to expand into new markets in the next 1-3 years?

Takeaway: Organizations who are holding their expansion plans for the next few years (55.8%) edge out those who do plan to expand (44.2%).

Organizations who are holding their expansion plans for the next few years (55.8%) edge out those who do plan to expand (44.2%). For those planning to expand, there was no market leader identified in the comments, with participants citing Asia/APAC, Europe, North America, “emerging markets” and the classic “world domination” as their expansion targets.

For these participants, as well as those from the non-expansion minded organizations who are already taking part in cross-border trade, a multilingual website will be a must-have.



Expert Insight



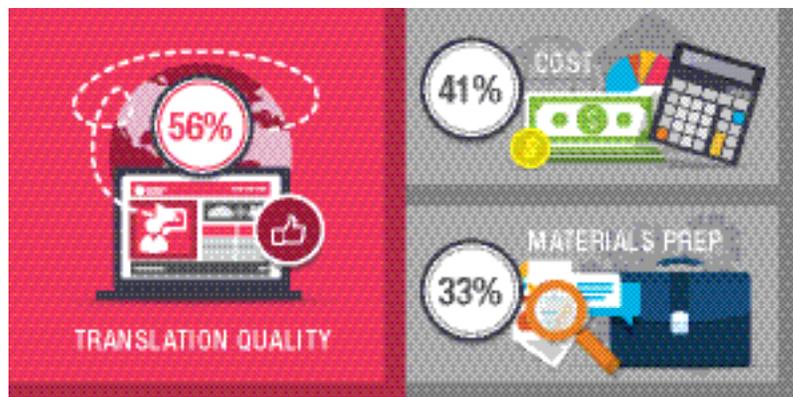
“Digital marketing is global by nature, and with challenging economic conditions in the more traditional markets companies are increasingly searching for growth opportunities in new regions or markets. Over the years, web content has become more dynamic, more diverse, and increasingly targeted to local markets. As a result, up-to-date, local language content has become critical for commercial success in any new market.”

—**Bert Esselink**

Lionbridge Business Development Director

Question 11: Select up to three challenges you currently face localizing your website.

Takeaway: Translation Quality is not only the most important aspect of website localization, but it's the biggest headache for our respondents.



As previously indicated in Question 7, Translation Quality is not only the most important aspect of website localization, but it's the biggest headache for our respondents. Translation Quality (55.8%) surpassed Cost (41.9%) and Materials Preparation (32.6%) as the top challenge they face in website localization.

Cultural Considerations were a challenge for 27.9% of participants, far outpacing Breadth of Languages at 15.1%.

Beyond quality, cost, and culture, juggling content and technology were cited as additional challenges. Exporting and Re-importing Content (19.8%) was identified by almost one-fifth, as were managing the Pace of Technology Change and Website Design Issues at 18.6% each. Additionally, 17.4% identified Learning Curve/New to Localization Management as a challenge for their organization.

Expert Insight

“Quality” is an oft-cited issue/challenge with the output of content translation efforts. More often than not, if content owners are using professional translation resources, these quality issues aren't actual errors, such as typos, misspelled words, or wrongly used terminology.

Sometimes, inconsistencies, ambiguities, and errors in the source text can yield unexpected issues with translations, especially if no up-front collaboration between client, in-country stakeholder, and LSP takes place.

This can be mitigated with a simple kick-off call to review intended style and preferred terminology. The results are translation style guides and glossaries that provide consistency and quality across projects. For more emotive advertising and marketing content, creative briefs that helped inform the source-language content creation may need to be shared and adapted for translation.

The key to reducing surprises in the tone and voice of the translation output (sometimes also cast as “quality” issues) is to be “planful” initially, and as necessary, establish lines of communications to address questions that may arise during the translation process.”



The majority of this year's survey respondents are pursuing a website localization strategy; however, nearly 40% are still without strategic approach, representing a substantial area for growth. For those who localize, there is no typical website localization experience — companies vary widely in how, what, and who localizes content. What they do have in common is the need to develop and deliver fresh, high-quality, relevant web content that supports their brand and enhances customer experiences.

Survey Participant Demographics

Question 12: What country/region do you reside in?

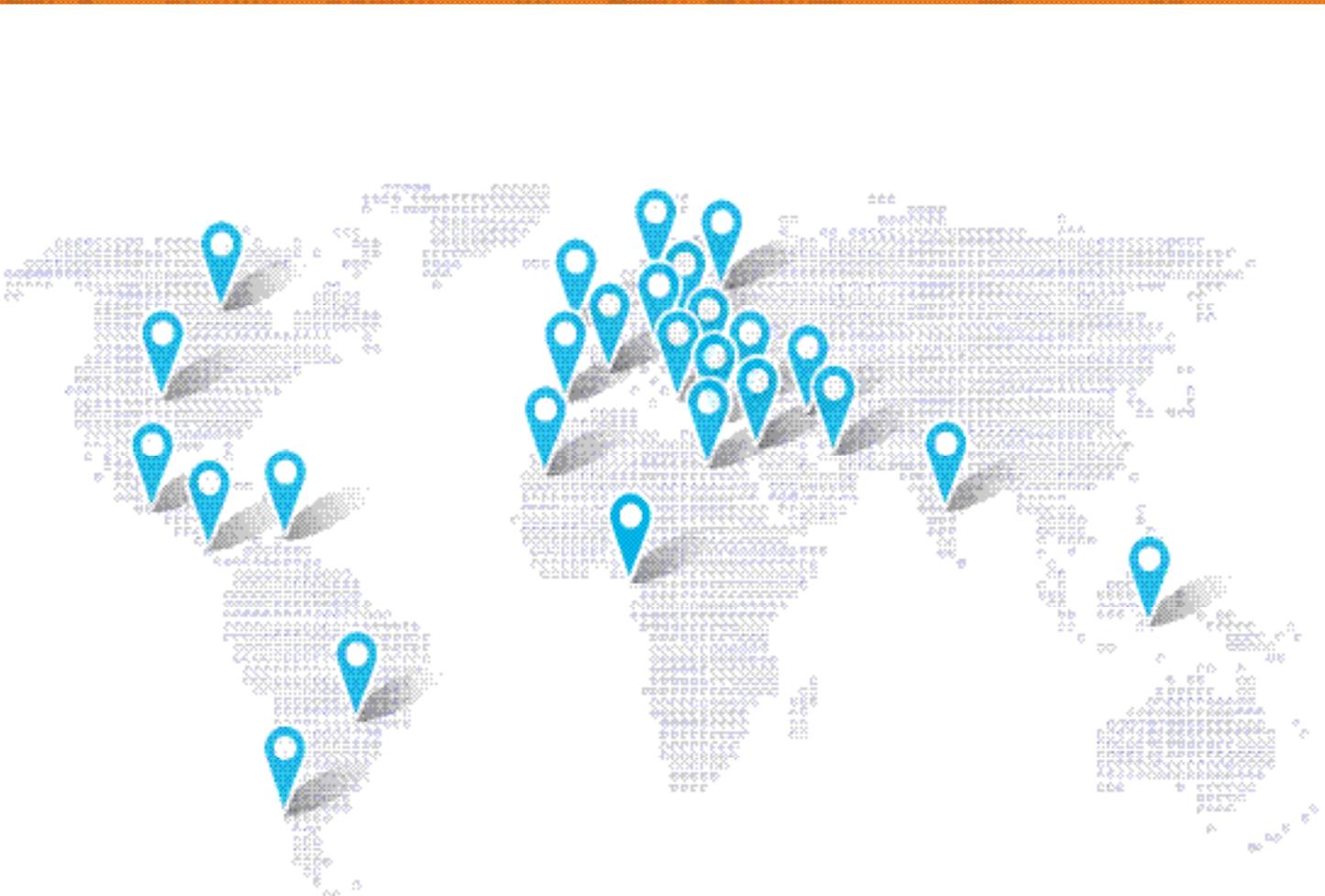
Demographic Data: Survey participants represent 31 countries from North America, South America, Europe, Africa, and Asia.

| | | |
|------------|-----------|----------------|
| Belgium | Georgia | Netherlands |
| Brazil | Germany | Poland |
| Bulgaria | Greece | Serbia |
| Cameroon | Honduras | Spain |
| Canada | Hungary | Sweden |
| Chile | India | Switzerland |
| Costa Rica | Indonesia | Turkey |
| Curacao | Ireland | United Kingdom |
| Egypt | Italy | United States |
| Finland | Jordan | |
| France | Morocco | |

Question 13: In what country is your company headquartered?

Demographic Data: Survey participants represent companies from 29 countries around the world.

| | | |
|-------------|-------------|----------------------|
| Afghanistan | France | Serbia |
| Argentina | Germany | South Korea |
| Belgium | Greece | Spain |
| Bulgaria | India | Sweden |
| Canada | Indonesia | Switzerland |
| Chile | Ireland | Turkey |
| Costa Rica | Italy | United Arab Emirates |
| Curacao | Japan | United Kingdom |
| Egypt | Netherlands | United States |
| Finland | Poland | |



Question 14: What is your primary industry?

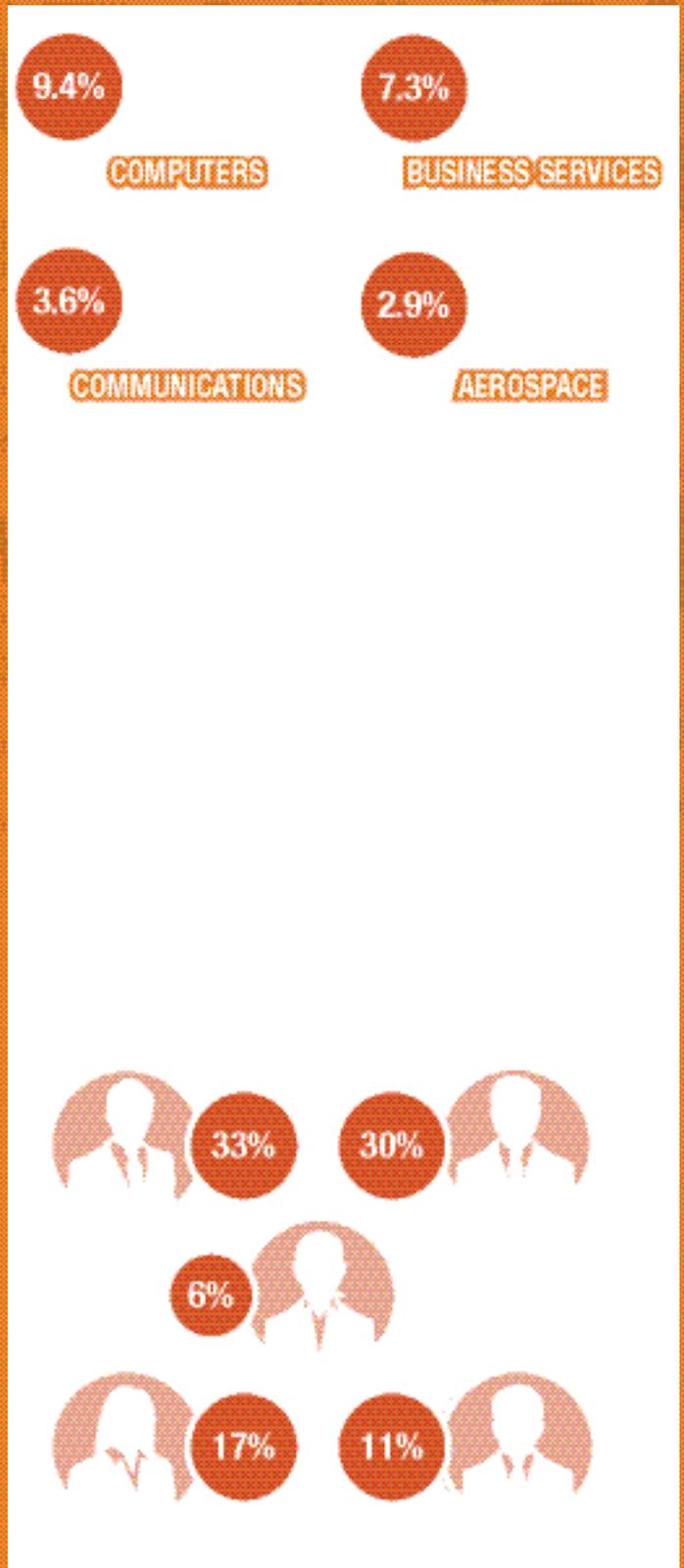
Demographic Data: Survey participants represent a broad range of 29 industries, from Professional Services to Manufacturing to Non-Profit.

Question 15: How many employees are in your organization?

Demographic Data: The majority (43.5%) of respondents work for companies with less than 1,000 employees, followed by those who work for large enterprises with more than 10,001 employees (23.9%), 5000-1000 employees (17.4%) and 1001-5000 employees (15.2%) respectively.

Question 16: What best represents your experience level?

Demographic Data: Who are our survey participants? Professionals (33.3%) and Managers (30.4%) make up more than half of our respondents, with Directors (17.4%) and executives (11%) at the top stakeholder level. Administrative/Support personnel represent 5.8% of participants.



About Lionbridge

Lionbridge enables more than 800 world-leading brands to increase international market share, speed adoption of products and effectively engage their customers in local markets worldwide. Using our innovative cloud technology platforms and our global crowd of more than 100,000 professional cloud workers, we provide translation, online marketing, global content management and application testing solutions that ensure global brand consistency, local relevancy and technical usability across all touch points of the customer lifecycle.

Contact Us

To learn more about Lionbridge's Website Localization Capabilities:
<http://www.lionbridge.com/solutions/website-translation/>

For general information, visit
www.lionbridge.com