

GLOBAL TRENDS

IN MARKETING LOCALIZATION 2023



Insights from
1,600+ MARKETERS

Introduction

For global brands that are expanding internationally, the stakes are high. Engaging new and existing customers with on-brand quality content matters more than ever.

Consumers now expect websites, blogs, emails, paid ads (and more) to be in their language. According to [CSA Research](#), **76%** of online shoppers prefer to buy products with information in their native language, and **40%** will never buy from websites in other languages.

Such demands put global marketers under increasing pressure to tell their brand story to international audiences and drive revenue with content. But all that content can feel endless: websites, product listings, ebooks, whitepapers, blogs, apps, paid ads, video, and so much more.

And the challenges can ramp up quickly for marketers when that content needs to be localized for multiple markets:

- How do they keep pace with the ever-increasing demand for multilingual content across more and more channels?
- Can they get their content out to international markets fast enough?
- Are they getting the right quality to convert users?
- Are their processes and technologies set up to scale into additional languages and new markets?

With these questions in mind, we conducted a survey of more than 1,600 private-sector global marketers across eight countries to understand how they are handling the challenges of localizing content as their business scales internationally.



Global marketers are under increasing pressure to tell their brand story to international audiences and drive revenue with content.





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About the survey

Overview

Date fielded: July 18, 2022

Countries surveyed: Brazil, France, Germany, Japan, Spain, Sweden, United Kingdom, United States.

Qualification criteria: Marketers who are translating content into a minimum of three languages and work for organizations with 300+ employees.



Audience breakdown

Respondents are from a range of marketing disciplines

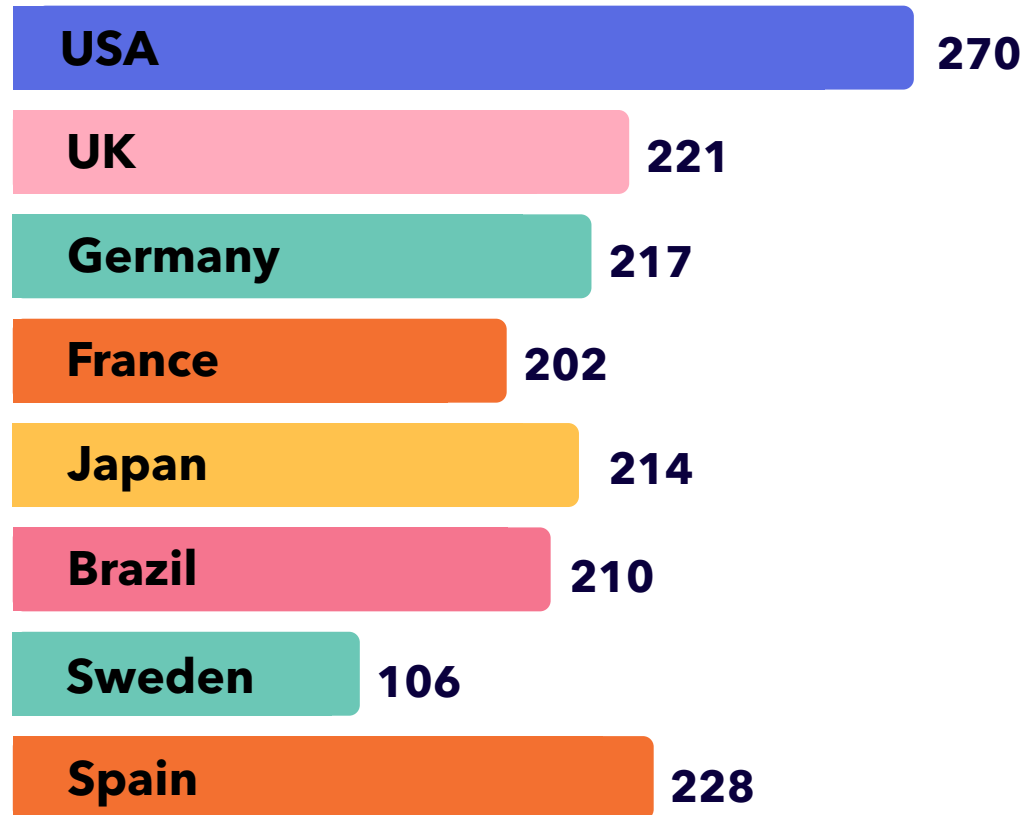


Most engaged industries:

-  Software / Technology / Electronics
-  Retail & Consumer Goods
-  Construction / Property Development / Real Estate
-  Manufacturing
-  Advertising and Media

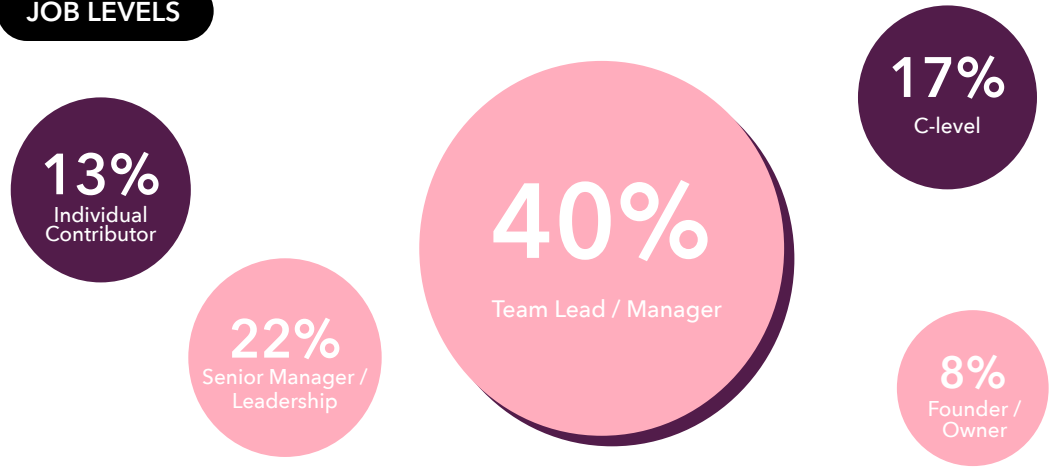
Audience breakdown

TOTAL RESPONDENTS 1,668



Audience breakdown

JOB LEVELS



COMPANY SIZE



Global trends in marketing localization

In this report, we'll explore the following six key trends in marketing localization that our survey revealed.

TREND 1

Marketers are investing in translation and localization

89% are planning to translate into additional languages within the next year.

TREND 2

Marketers are now embracing Machine Translation, and it's delivering the quality they need

39% say they are using Machine Translation as part of their localization strategy, and it's delivering quality.

TREND 3

Translation quality is the number one challenge for marketers

23% named translation quality as their biggest challenge when localizing marketing content.

TREND 4

Highly manual localization processes are affecting quality for marketers

67% of marketers who are "not confident at all" in the quality of their translations have a highly manual localization process.

TREND 5

Localization is driving revenue growth and other wider business goals

84% say that localization has had a moderately to extremely positive impact on revenue growth.

TREND 6

Companies in the early stages of Language Operations are reporting higher quality

53% of marketers with dedicated localization teams are extremely confident in the quality of their translations.

Marketers are investing in translation and localization

Global marketers are seeing the value of translating and localizing content. How do we know?

They're investing in language more than ever before: a whopping **89%** of our survey respondents plan to translate into additional languages within the next year.

Of this 89%:

- More than half (**52%**) plan to translate into 1-4 new languages
- **24%** plan to translate into 5-8 more languages
- **13%** plan to translate into 9 or more additional languages

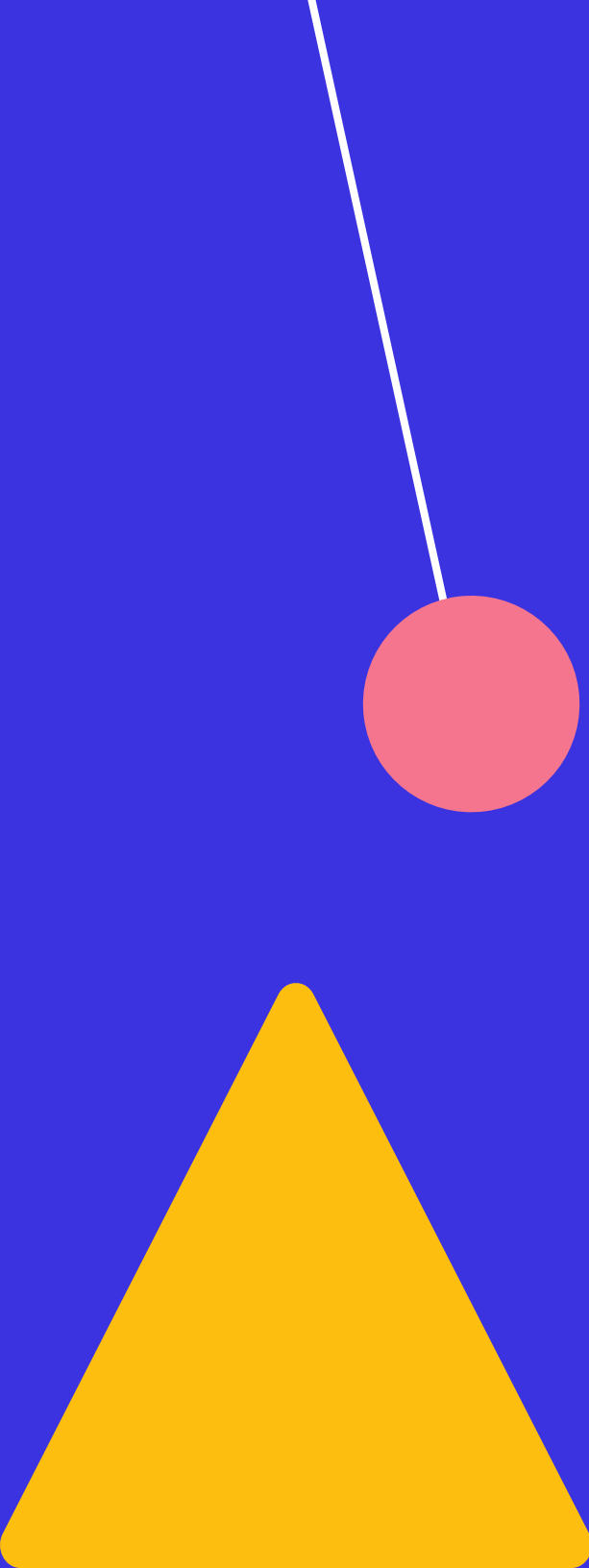


89% of respondents plan to translate into additional languages within the next year.

In addition, **75%** of participants say their translation spend has been trending upwards, or is roughly stable, of which **83%** are seeing a moderately positive or extremely positive impact on revenue growth.

Localization, it appears, is showing ample ROI to justify further investment.





The findings also show there's been an uptick in the use of Machine Translation (MT), with **39%** of respondents now using MT as part of their localization approach. However, **80%** of this group say their translation spend is trending upwards or staying stable, despite the fact that MT typically decreases translation costs.

This suggests that marketers who are including MT as part of their localization workflow are seeing real value, and re-investing cost savings from MT optimization into localizing more content across the funnel. The same spend is enabling them to have a bigger impact on their key metrics.



Translation and Localization

Localization and translation are often used interchangeably, but there's a difference. Translation is the process of taking content from one language into one or multiple languages. Localization goes beyond language and involves adapting a product or service for a target market in terms of text, colors, imagery, cultural norms, and the formatting of dates, times, currencies, and more. Translation is one step in a wider localization process.

Below we can see the wide variety of content respondents say they're localizing.

What marketing content are you currently localizing?*



Our survey also confirmed that localizing marketing content is directly affecting business outcomes. **84%** report that content localization efforts have had a positive impact on revenue growth.

**Survey participants were asked to choose all options that applied*



84% of survey participants report that content localization efforts have had a positive impact on revenue growth.

Many respondents are starting to include top of the funnel (ToFu) content for localization such as blogs, eBooks, white papers (**42%**), email (**41%**), and paid ads (**46%**).

That's good news for content teams. The value of ToFu content has often been a challenge to measure, but investing in localization here indicates that marketers are now seeing conversions from this content in other markets.



"Try to keep in mind that just translating the words won't be enough. You need a team to study the culture and climate of a region and adjust your whole brand experience accordingly."

- Survey participant

Adapting the brand for other markets

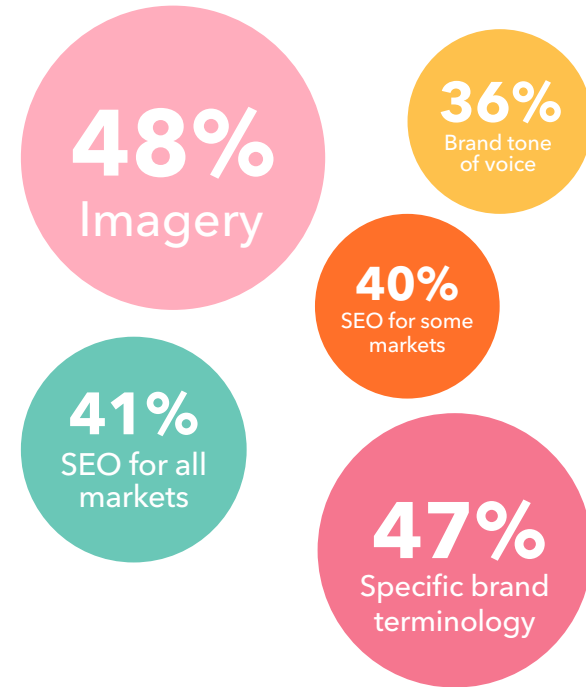
Many marketers are also adapting additional elements of their brand for other markets, including imagery (48%), specific brand terminology (47%) and brand tone of voice (36%). These elements can vary across different markets and cultures, e.g. the French market often prefers a more formal brand tone of voice than the US market.

A strong trend towards localizing SEO is also emerging, with 41% saying they're localizing their SEO for all of their markets, while another 40% are localizing SEO for some markets they serve.

This isn't surprising, as SEO is a key focus for most marketers: there's little point in creating engaging content if customers can't find it. But multilingual SEO can bring complexities, and there are many aspects to achieving efficient SEO in multiple markets. One example is keywords and intent, which often differ from market to market. Marketers need to go beyond translation to get multilingual SEO right as they often need to find a new set of keywords per market and to optimize their content for each market.

Adapting these brand elements suggests that many are gaining more maturity and experience in localization as they move beyond just translating copy.

The takeaway: The survey findings show that marketers are investing in more languages, that translation budgets are trending upwards or staying stable, and they're also localizing a wide range of content. This suggests that marketers now perceive localization as an international growth driver.



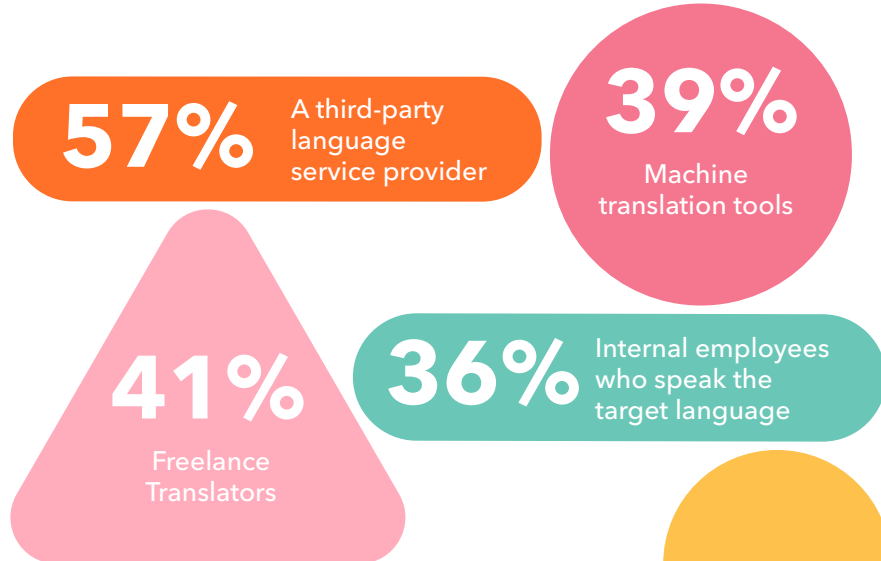
"Don't approach localization as a one-off. Have a strategy for which markets require localization, and which elements are to be localized and then budget and plan accordingly."

- Survey participant

Marketers are now embracing Machine Translation, and it's delivering the quality they need

Brands are clearly investing in localization, but how are they actually doing localization?

How are you currently localizing your marketing content?*



*Survey participants were asked to choose all options that applied



39% of marketers said they are using Machine Translation as part of their localization strategy, **83%** of which are confident in the quality of their translations.

The findings suggest that respondents are using a mix of methods as part of their localization approach.

A significant number (**36%**) of marketers are still relying on internal colleagues for whom translation is often not their core job. This suggests that, despite increased budgets, there's still a fairly widespread reliance on processes that are difficult to scale.

However, **39%** of marketers also said they are using Machine Translation as part of their localization strategy, **83%** of which are moderately to extremely confident in the quality of their translations.

While Machine Translation (MT) is still a growing technology, momentum is building and marketers are growing with it.

The [machine translation global market](#) has increased by 124% over the past five years – from a \$450 million market in 2017 to a \$1.1 billion market in 2022, with steady year-over-year growth.

Additionally, [Gartner predicts](#) that by 2025, **75%** of translators' current work is expected to shift from creating translations to reviewing and editing targeted sections that were translated by machines.

MT has traditionally delivered cost and time savings, yet in the past those two benefits often came at the expense of quality. Quality is key for marketing content, which needs to convert customers while meeting style guidelines.

Our survey findings support a major shift towards marketers embracing MT as part of their localization strategy, and that it's delivering the quality they need. It's likely being driven by two things:

- The huge improvements in the quality of MT output that now make it viable for more creative marketing content.
- The need to find approaches that work as a brand scales into new markets and languages.



Machine Translation (MT) can encompass everything from free open-source tools (e.g. Google Translate) to highly customized MT engines (e.g. Unbabel) that are trained on a customer's domain-specific data, where the output improves over time (machine learning). Approaches to using MT can also differ from relying on pure MT output (with no human input) typically for lower priority content, to post-edited MT where a translator edits MT output, delivering high-quality results.



The MT global market has increased by **124%** over the past five years – from a \$450 million market in 2017 to a \$1.1 billion market in 2022.

MT adoption is similar across organizations of all sizes

The split of marketers who are using MT was pretty even across all organization sizes, with a slight uptick for organizations that had over 1,000 employees.

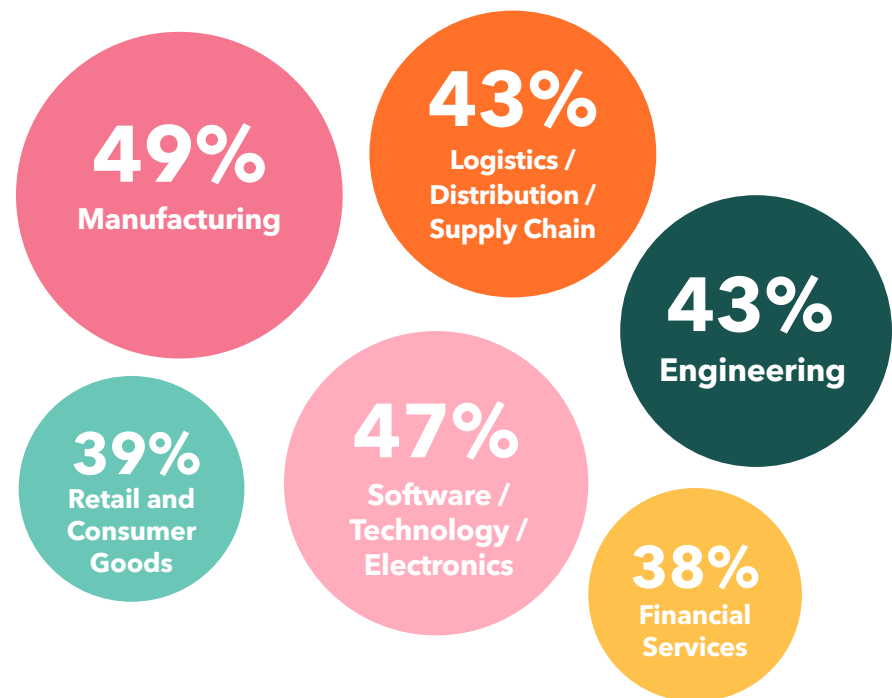


What industries are using MT?

According to our survey, a number of industries are leading the way in adopting Machine Translation.

The technical content that is common across manufacturing, logistics, distribution, supply chain, and engineering have historically made it a good match for Machine Translation, so it's no surprise to see these industries leading the way here.

Catching up, however, are their high-growth counterparts such as retail, consumer goods, financial services, software, technology, and electronics. This could be driven by a need for them to scale faster into new markets, with the gains in quality that MT has made over the past few years providing the perfect solution.



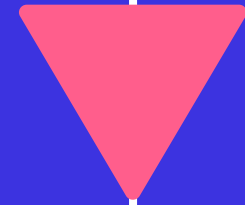
The United States is the leader in MT adoption

From a country perspective, France is the lowest MT adopter with only **26%** of French marketers using MT tools as part of their localization approach. The US, on the other hand, is the highest adopter of all the countries we surveyed. **49%** of US marketers are using some degree of MT as part of their localization approach; this makes sense given that US companies have more global reach and they're using MT to localize more content in more languages.



There's clearly momentum for MT as marketers appear to be embracing it as part of their approach to localization, and as a viable way to scale their global content.

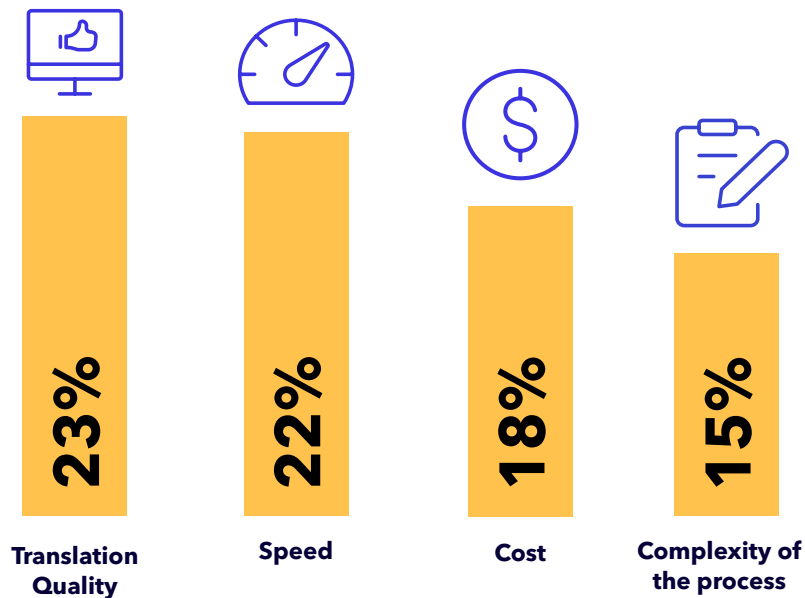
The takeaway: There is still a way to go before marketers reach high levels of MT adoption, but for now results indicate many are starting to move beyond any outdated views that MT can't deliver the quality they need. Early adopters of MT across all their content types will likely be able to move faster, giving them an edge in highly competitive international markets.



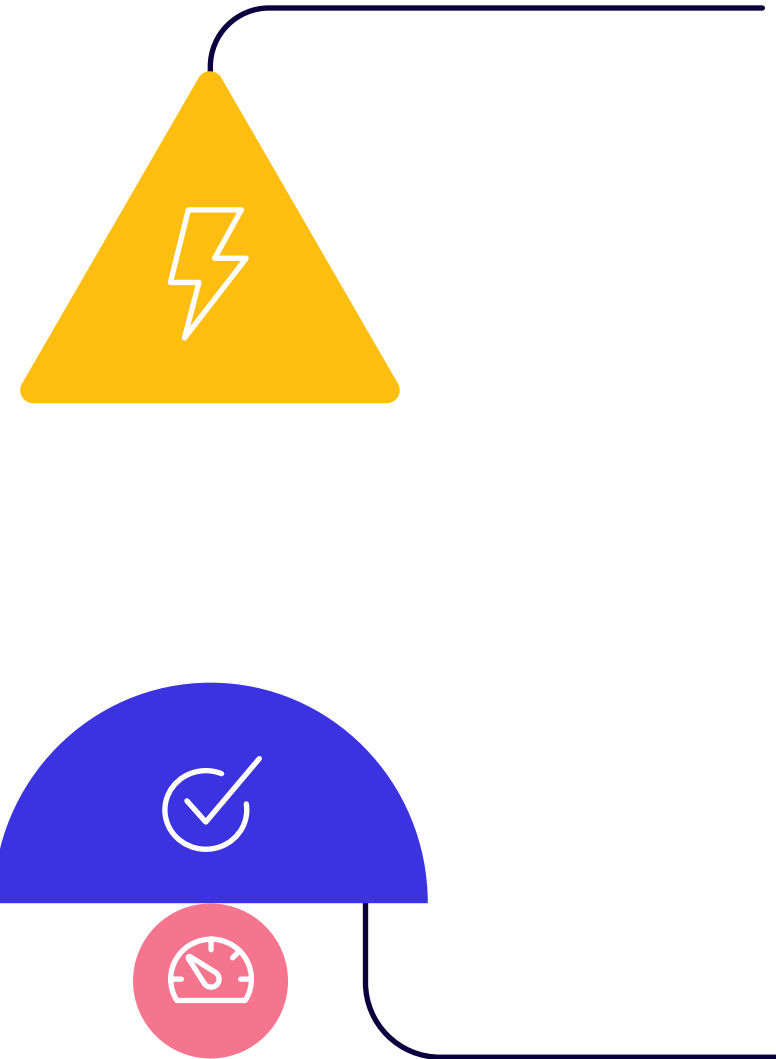
Translation quality is the number one challenge for marketers

What is your biggest challenge with localizing marketing content?

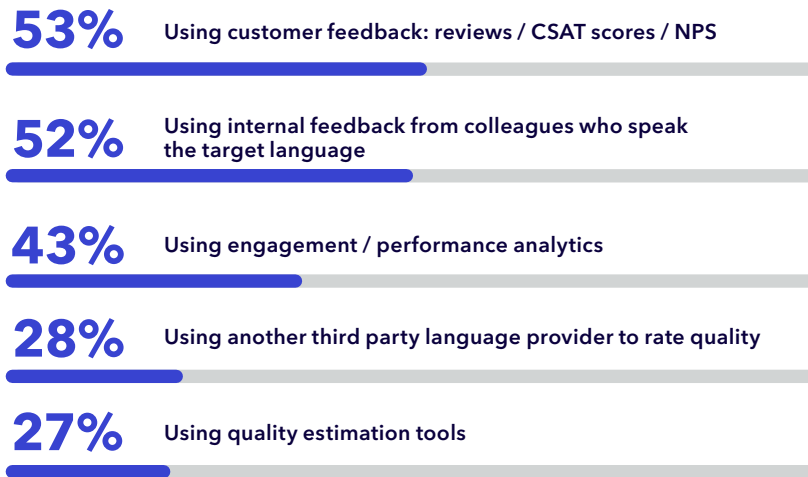
These were the top four responses:



It's no surprise that marketers are focused on the quality of their content: it's a vital part of branding and conversions. Time and effort go into crafting the perfect message and shaping the right campaigns, and it can be a challenge to ensure that message still resonates as marketers scale into many new markets and languages.



How are you measuring the quality of your translations?*



Marketers are reporting a mix of different methods to measure translation quality, many of which rely directly on human input.

In addition, more than half (53%) rely on some type of customer feedback to gauge how their users are interacting with and rating their content. This suggests that many marketers are not actually measuring quality before it reaches their customers, but rather using them to ‘test’ it.

However, 27% are already using quality estimation tools, meaning that the quality is measured and can be improved prior to the content being shared with customers; this approach is also designed to scale as content volumes and languages increase. Similar to the use of MT, early adopters of these types of technologies have the advantage over their competition when it comes to scaling up their Language Operations.

The takeaway: The data suggest that while some marketers are embracing scalable approaches such as using quality estimation to measure translation quality, there’s still a way to go for many others. A standardized industry-wide way of measuring translation quality will be needed in the future to ensure consistency and scalability.

*Survey participants were asked to choose all options that applied

Highly manual localization processes are affecting quality for marketers

Our survey findings suggest that localization has lagged behind other areas in marketing in terms of digitalization and automation, e.g. modern marketing tech tools such as marketing automation, intent data platforms, and content management systems, to name a few.


A significant number of respondents (**41%**) say they have a highly manual localization process, while **41%** have a partially automated process and only **18%** have a fully automated process.

Manual localization processes often involve copying and pasting content from one system to another in order to prepare content files for translation, or sending and receiving content for translation via emails rather than via a smooth automated flow between systems (e.g. website to third party language service provider's systems via API).



"The best thing you can do is make sure you have the right processes and tools for the job."

- Survey participant



The reality is that these processes struggle to scale when the volume of content and number of languages increase, and the result is slower turnaround times with a potential for increased human error. Marketers with highly manual approaches will also have difficulty tracking the status of their localization efforts or measuring the overall cost and quality.



67% who said they were “not confident at all” in the quality of their translations have a highly manual localization process.

The takeaway: Our findings suggest that highly manual processes are linked to lower quality translations. This isn't surprising as any challenges are likely to be magnified as marketers scale into new markets and languages: they won't be able to move fast enough and maintain quality.

Localization is driving revenue growth and other wider business goals

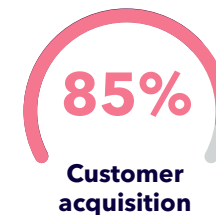
Language can often be viewed as a barrier to entry into new markets, but our findings suggest marketers view localization as a major opportunity to connect with their international audiences.

When asked “**How does localizing your marketing content impact the wider organizational goals?**”, respondents reported that localization is having a moderately to extremely positive impact on key business goals.



84% of global marketers say that localization has had a positive impact on revenue growth.

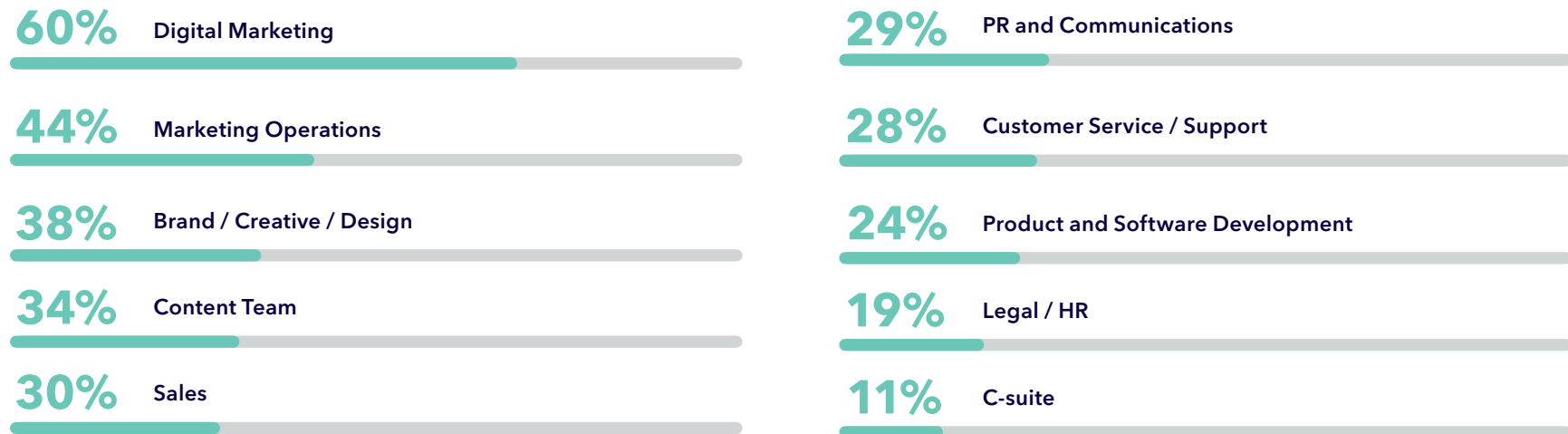
The takeaway: Our survey respondents confirm that their localization efforts are having a positive impact on key business goals: it’s good for the top line and bottom line. This suggests it’s a good time to be a global marketer and they’re clearly feeling momentum for localization.



Companies in early stages of Language Operations are reporting higher quality

As companies start to localize for new markets they tend to rely on a mix of people, process, and technology working together as they scale.

Which stakeholders are involved in your localization process?*



The responses suggest marketers involve a wide range of stakeholders in localization, but adding more teams to the mix can also add to the complexity.

**Survey participants were asked to choose all options that applied*

The survey results also revealed that:

- **64%** of global marketers report having a dedicated team that handles localization across their company, of which **53%** are extremely confident in the quality of their translations.
- Comparatively, out of the **31%** who say each department handles their own localization initiatives independently, only **30%** are extremely confident in the quality of their translations.

The data indicate that consolidating localization efforts is paying off.

Although creating a dedicated centralized localization team suggests many companies are in the early stages of setting up a Language Operations (LangOps) model to break down silos and unify their localization approach, it's not yet clearly defined.

Fully embracing a LangOps model means companies also need to leverage process and technology in a holistic way, but the findings suggest that many marketers (**41%**) are still using highly manual localization processes and MT adoption (although rising) is still only at **39%**.

The takeaway: Many organizations have already set up a dedicated localization team which suggests they are in the early stages of a Language Operations model, which is leading to greater efficiencies and quality. This centralization ensures a strong foundation for them to scale up their localization efforts in the future.



What is Language Operations?

Language Operations (LangOPs) is an emerging category as recognized by [Gartner® 2022 Hype Cycle™](#) for Natural Language Technologies.

It's a holistic strategy that helps organizations leverage people, processes, and technology to power multilingual communication for greater visibility, transparency and control over every aspect of language across their business. This efficient, scalable, and cost-effective model unifies all the translation efforts across an organization under a single owner.



"Create a central localization team so you can be more consistent."

- Survey participant

Conclusion

Delivering first-class multilingual experiences for customers matters more than ever: without it, global brands will fail to grow, compete and win in international markets. This is a hard-wired, non-negotiable customer expectation.

There's no doubt that a disproportionate level of the burden of localization can fall on global marketers, who are the shock troops telling the brand story, attracting new audiences, and retaining valued customers. The problems can quickly multiply for marketers as the business scales: more languages, more markets, more content, more campaigns.

But even when marketers devote a lot of time and resources to localizing content they can still be ineffective. The heart of the challenge is how to reach multilingual audiences with content that is of the right quality to convert, and to do so over and over again, and on time.

The good news is, there's a solution, and the global marketers we surveyed are showing us the way.



The good news is there's a solution and global marketers are showing us the way.



Recommendations: where's the opportunity for global marketers?

There is a clear path to delivering quality multilingual experiences at scale. The data in this survey tell us that delivering the right quality is built on the three pillars of: automating localization processes, deploying machine translation technology, and centralizing Language Operations.

The most successful global marketers are embracing such approaches, allowing them to rapidly serve existing markets while laying the foundations to scale into new ones.

For global marketers the time is now to invest in:

- A **Language Operations** approach that centralizes translation and localization efficiently and holistically around one accountable team.
- **Machine Translation** at the right time to advance and accelerate translation workflows.
- **Quality estimation** tools that enable organizations to refine their translations at scale, before the content is published.
- **Automating localization processes** so repetitive steps in adapting content for local markets are streamlined, and focusing human capital at the right point.

Leveraging a **LangOps approach** that blends people, process and technology will enable global marketers to focus on exceptional storytelling that resonates with audiences as they scale into new languages and markets.



Delivering the right quality is built on the three pillars of: automating localization processes, deploying machine translation technology and centralizing Language Operations.

About Unbabel

Unbabel eliminates language barriers so that businesses can thrive across cultures and geographies.

The company's Language Operations platform blends advanced artificial intelligence with humans in the loop, for fast, efficient, high-quality translations that get smarter over time. Unbabel helps enterprises grow into new global markets and builds customer trust by creating more consistent, high-quality multilingual customer experiences across marketing and customer service.

Based in San Francisco, Calif., Unbabel works with leading brands such as Booking.com, Nestle, Panasonic, Patagonia, and UPS, to communicate effortlessly with customers around the world, no matter what language they speak.



Start translating today

