

# Website Globalization Report 2007

1,939 Multinational & International  
Marketers Reveal Tactics on  
Translating Content & Best Practices

*39 Charts, Tables & Images*



## Website Globalization Report 2007

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# Introduction

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We live in a world of many languages, cultures and countries. And, yet, there is just one Internet.

Which is why thousands of companies – from Amazon to IBM to Deloitte to Yahoo! – have translated and localized their websites for audiences around the world – a process commonly known as **Web globalization**.

Web globalization isn't just for the large multinational corporations anymore. Companies of all sizes are capitalizing on the Internet to expand beyond borders or to extend into new cultural groups within existing borders (i.e., Spanish for the U.S.).

Because Web globalization drives sales, it is marketing executives who drive Web globalization.

But exactly how many marketing executives are leading Web globalization efforts? How much are they spending? And what languages are most important?

That's where this survey fits in.

We surveyed 1,939 marketing executives in March 2007 and discovered that Web globalization is well past the “emerging” stage. **More than 30% of the executives now manage multilingual websites, with another 17% expected to launch Web globalization efforts over the next 12 months.**

This report provides valuable insights into how companies of all sizes approach Web globalization – from languages to budget to ROI. We present these survey findings along with a primer that includes a number of key trends.

## Key Findings

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Of the 1,229 U.S. respondents, more than 30% have already translated parts or all of their websites. Furthermore, an additional 17% plan to do so in the next 12 months.

Most executives who have invested in Web globalization say the money was well spent.

Although lack of funds is a large obstacle to Web globalization, it is not the leading obstacle. More than half of all respondents point to lack of time as the greatest challenge.

Also, more than half of the respondents spent less than \$50,000 so far on Web globalization. But spending plans are increasing. Roughly half say they have plans to increase translation spending.

18% of all large organizations surveyed have spent more than \$500,000 on Web globalization. Small companies show the greatest interest in “significantly” increasing their translation spending over the next year.

German is currently the most popular language supported on the Web, but Spanish is expected to overtake it within the next 12 months, and Chinese (Simplified) is quickly gaining ground.

More than 16% of U.S. respondents offer some Spanish-language Web content for the domestic market. An additional 22% plan to add Spanish content.

Small companies in particular show a strong preference for adding Spanish to their websites.

Translations.com was the most-recognized Web globalization vendor, far surpassing its two larger competitors: Lionbridge and SDL.

More than 30% of the respondents already use multilingual AdWords or a similar service. By next year, more than half of the consumer-focused companies surveyed say they plan to use multilingual keyword advertising.

The majority of respondents rely on Web traffic and leads generated as the two major metrics for evaluating the success of their localized websites.

# **PART I**

## **WEB GLOBALIZATION PRIMER**

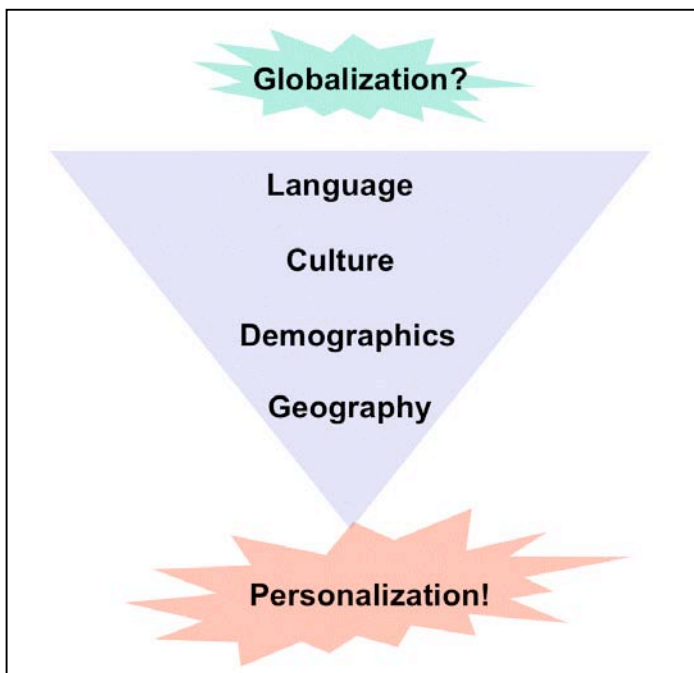
# Web Globalization 101

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At first, Web globalization can be a bit intimidating to understand. There are plenty of new terms to decipher – from *localization* to *internationalization* to *translation memory*.

But here is a simple way to think of it: **Web globalization is personalization on a global scale.**

**Image 1.1: Globalization is Personalization**



When you *localize* a website for another market, translation may be the most visible aspect of the process, but it is just one aspect, and sometimes the easiest to accomplish.

For example, if you support ecommerce in the U.S. and plan to do the same in Japan, a host of potentially more complex issues exist – from shipping and payment to returns and customer support.

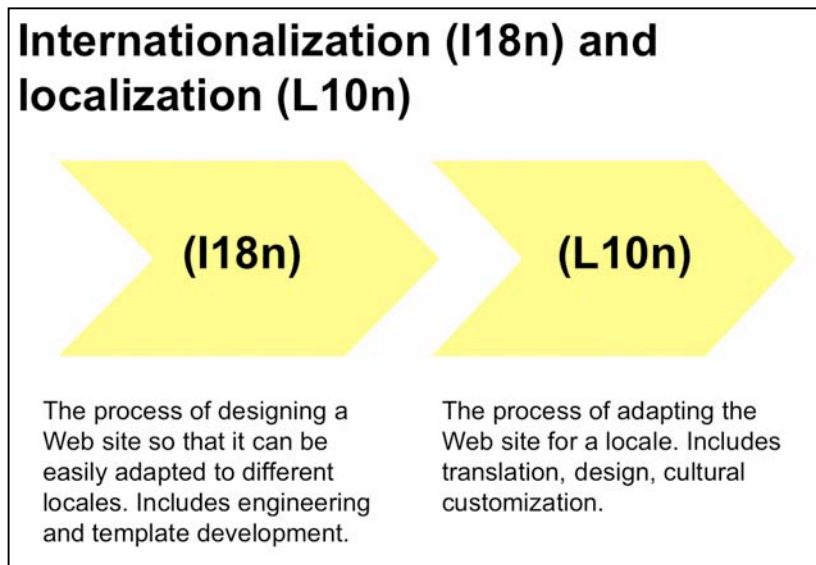
So, before you rush off and hire a translation agency, you need to make sure you have a game plan that takes into account the entire process of marketing and selling to new countries and cultures.

The process of Web globalization is divided into two broad stages:

1. Web Internationalization
2. Web Localization

FYI: You will often find that translation vendors abbreviate these two terms as I18n and L10n.

**Image 1.2: Internationalization and Localization**



The internationalization stage involves developing a website that can be easily adapted to all the markets and languages you wish to support. This process may include designing global templates that can be used by teams in all local offices and that can support a variety of languages. You may also develop a global navigation strategy for directing visitors from the .com website to the localized websites – a detail often overlooked when companies initially go global.

Internationalization and localization complement each other. The better you internationalize your website, the fewer problems you'll have when localizing your site for each market.

You don't hire translators until the localization stage. Localization is when you translate content, localize visuals and tailor products and promotions for the target market.

FYI: The terms *Web globalization* and *Web localization* are often used interchangeably simply because *globalization* resonates with a wider audience than *localization* does. The important thing to remember is that whatever you call it, the process involves a great deal more than translation.

### **Questions to Ask Before Going Global**

Here are a few of the questions Web and marketing teams must consider before taking a website global:

- Are the local and regional teams involved in the process and enthused about managing and/or creating local content?
- How does one manage user expectations if only a portion of the local website is translated (which is often the case when companies begin going global)?
- Have we internationalized our source language content so it would be relevant when translated? For example, have we taken out any baseball metaphors before translating for a market where baseball is not a major sport?
- Does our website support local currencies and preferred payment options?
- Does our website display local time, date and measurement formats?
- Can we handle emails and phone calls in the local languages?
- If we sell physical goods, how do we manage delivery, tariffs and returns?
- Is the website's search engine localized for the intended language and optimized for the culture?
- Should we translate our brand names or slogans, or are they better left in their source languages?
- How do we direct leads to the local sales team? Can our Web forms handle different languages properly and are the input fields correct for the market (i.e., 'surname' vs. 'last name')?
- Do we have a global navigation strategy for directing Web users to their localized websites?
- Once the localized site has gone live, do we have a plan (and budget) for keeping the content in sync with the source-language website?

Successful Web globalization is all about managing details.

# Web Globalization Trends

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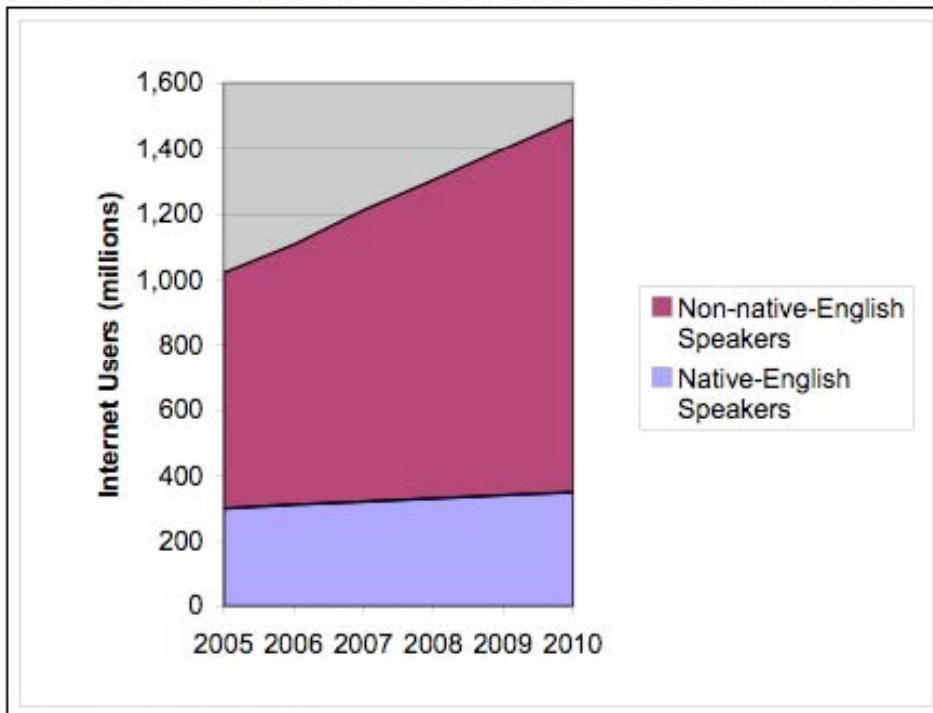
## Most Internet Users Don't Speak English

Web globalization, for a growing number of companies, isn't just a luxury but a necessity. And it all comes down to global business and Internet trends.

Today, only 30% of the world's Internet users are native-English speakers. By 2015, this number will drop to less than 25%. To successfully address the majority of Internet users in the years ahead, companies have no choice but to translate their content.

**Chart 1.3:**

**Non-English speakers will represent 79% of all Internet users by 2010**



Source: Byte Level Research

### More Languages Are Inevitable

Over the past five years, companies have steadily increased the number of languages they support. Based on *The 2006 Web Globalization Report Card*, an analysis of 300 global websites, Byte Level Research found that companies increased the number of languages on their websites by an average of 18% over the previous year.

As shown here, companies such as BMW and Starbucks have doubled the number of languages they support in a relatively short period of time.

**Table 1.4: Number of Languages Supported, by Year**

Company	2003	2005	2006
BMW	16	32	34
Coca-Cola	16	26	26
Dell	14	21	25
eBay	10	9	12
Google	65	97	115
IBM	16	32	32
Palm	9	10	10
Starbucks	5	9	10
UPS	11	13	13

Source: Byte Level Research

### Most Popular Languages

Chinese is now one of the most popular languages on global websites. Of the 300 websites studied, the top 10 most common languages are:

1. English
2. German
3. French
4. Japanese
5. Spanish (Spain)
6. Chinese (Simplified)
7. Italian
8. Spanish (Latin America)
9. Korean
10. Portuguese (Brazil)

Chinese has increased in importance as more companies target this emerging market. We expect Chinese to move into fifth place in 2007.

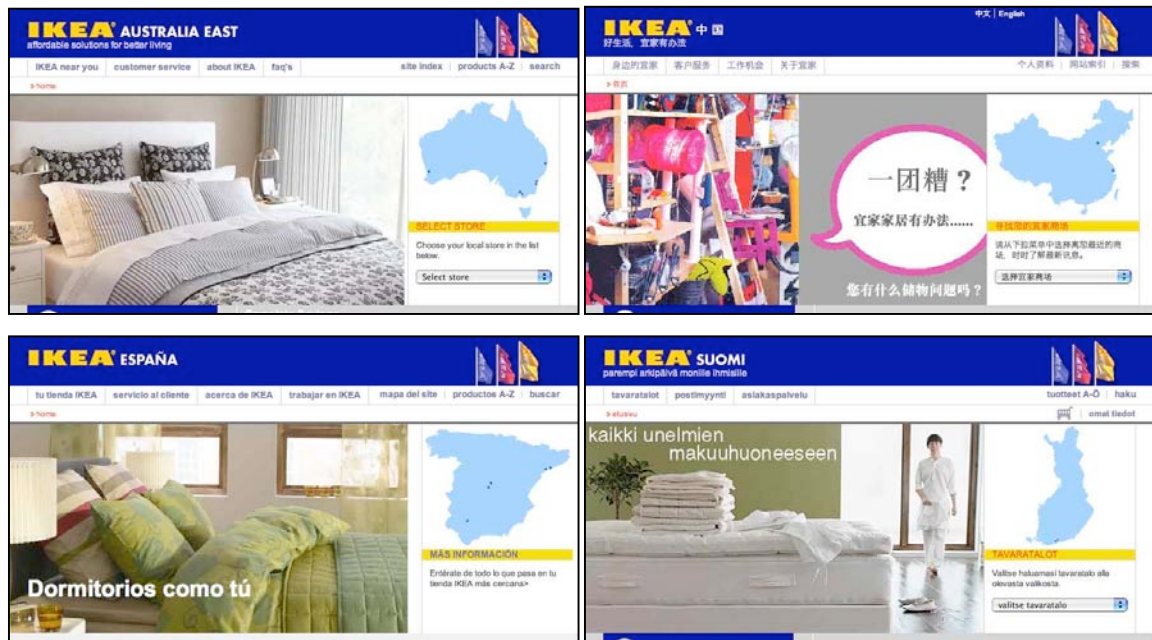
# Web Globalization Best Practices

Based on Byte Level's analysis of successful global websites, a number of best practices have emerged. Here are four of the most important best practices to keep in mind as you take your site global:

## 1. Web Designs That Scale

During the internationalization phase of Web globalization, consider developing a global design template (or templates) that can be used across all localized websites. Consider IKEA, shown here. The company uses a simple global template that all local websites share.

Image 1.5: IKEA Global Template



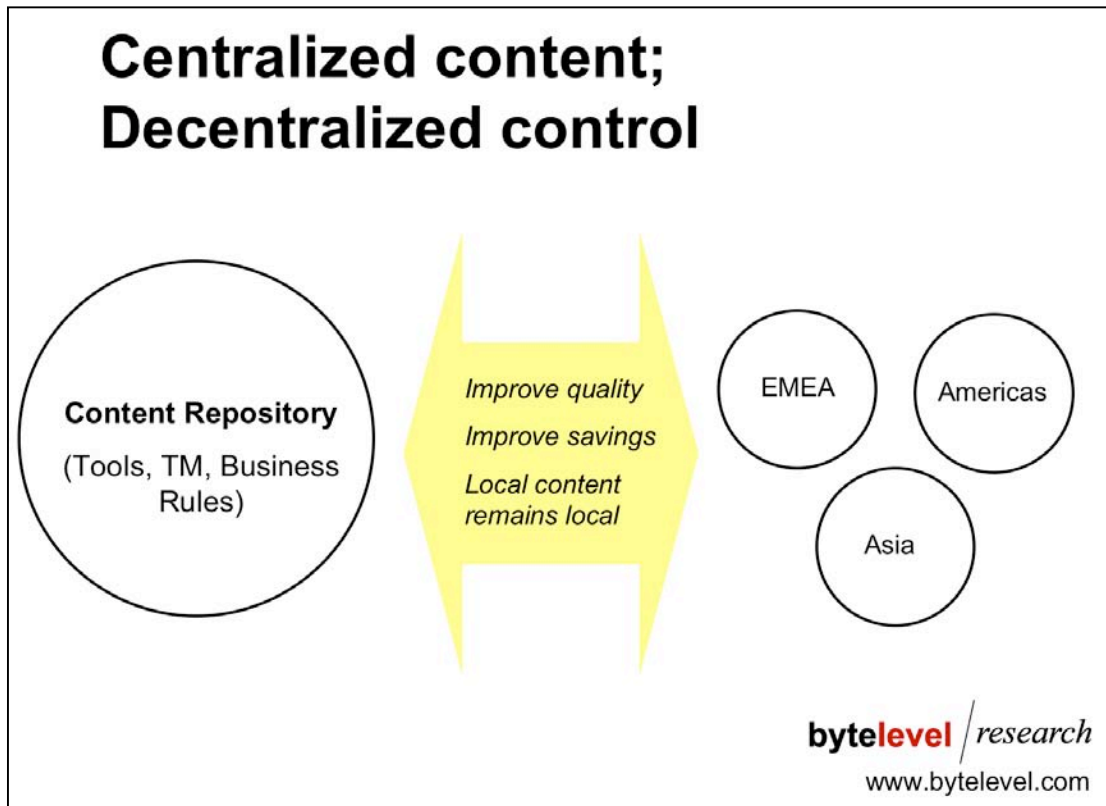
The advantage of the template is that every country site conveys a consistent brand image. Also, it benefits users who may navigate between locales. In addition, when all local sites work within templates, it becomes much easier to deploy global promotional elements, as there are consistent dimensions globally.

However, it's important that each local site have the real estate and flexibility to present local content as needed. The IKEA global template takes up less than 25% of the Web page real estate.

## 2. Centralized Content; Decentralized Control

Companies are increasingly centralizing their content using global content management applications and globalization workflow tools. Doing so makes sense, as it allows all local and regional offices to be trained on (and shared in the costs of) the same software platform.

**Chart 1.6: Centralized Content; Decentralized Control**



However, it's important to balance centralized content and tools with decentralized control of this content. This is where motivated and well-trained local teams come into play. If the corporate headquarters uses too heavy a hand on the local teams, it risks losing this enthusiasm. Furthermore, local teams should communicate with one another across borders to share tips and techniques.

## 3. Lightweight Web Pages

Although more than half of all U.S. Internet users have broadband Internet access, in many countries that number is less than 10%. This is why you need to consider developing "lightweight" websites for these markets.

Consider Google. It is no coincidence that this Web page, which weighs just 13 kilobytes, is so popular in markets where dial-up Internet access dominates. While your website need not be as sparse as Google's, it's important to have a weight limit in mind that is localized for your target markets.

#### **4. A Global Gateway Strategy**

As you develop localized Web pages, you also need to develop a “global gateway” strategy for directing users to these local sites. Many large multinationals report that more than half of the visitors to their .com home page originate from outside the United States. A successful global gateway ensures that these visitors find what they're looking for.

The most important thing remember as you develop your strategy is the fact that visitors to your website may not understand English. So, keep the following issues in mind:

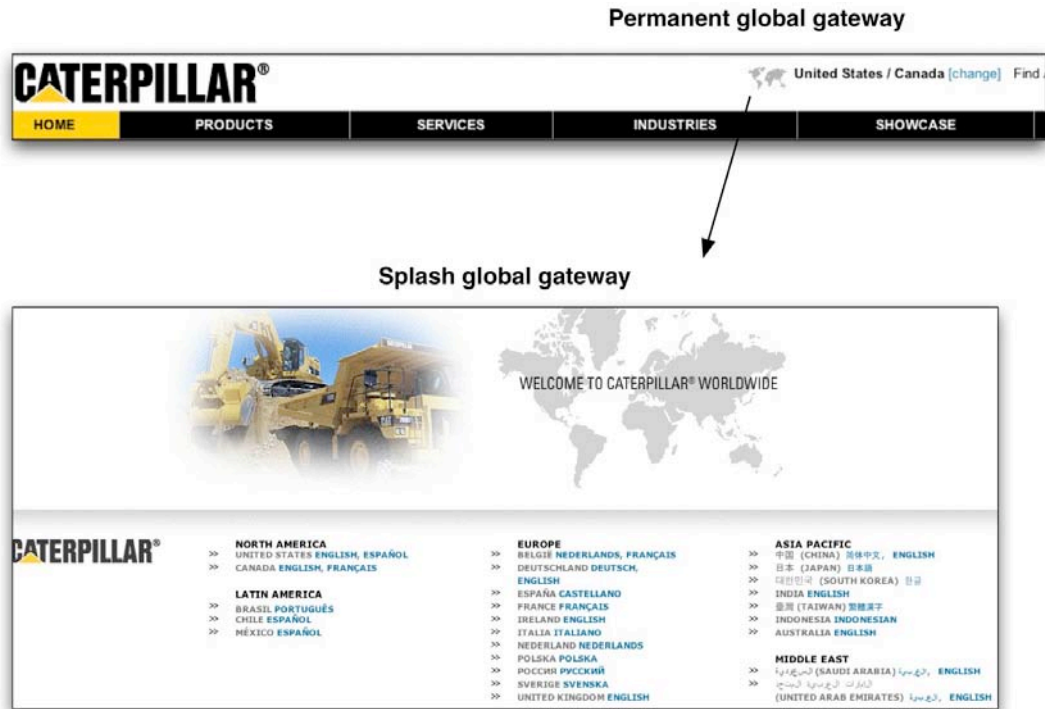
- If you can host your website on a country domain, such as [www.acme.de](http://www.acme.de) for Germany and [www.acme.fr](http://www.acme.fr) for France, do so. This makes it easier for users to go directly to your site without having to navigate through the .com site.
- Whenever possible, present country and language names in the local language. For example, use *Deutsch* instead of *German*.
- Avoid using country flags to denote a language. The Swiss flag, for example, could represent more than one language. And there is no one flag that easily represents Spanish, or even English.

Finally, if you support a number of localized websites, consider using a splash global gateway for all visitors to .com. This allows visitors to self-select their preference. You can then capture this preference as a cookie on the Web user's browser so they return to this localized website on return visits.

As shown here, Caterpillar uses a permanent global gateway located at the top of every Web page and a splash global gateway that all visitors to .com encounter.

If someone enters Caterpillar France and wants to change countries, the gateway at the top of the page (nicely highlighted by the map icon) takes them to the splash gateway so they can change locations.

**Image 1.7: Caterpillar Global Gateway**



Map and globe icons are excellent devices for communicating to users regardless of the language they speak. Also note that the splash gateway presents countries in their native language.

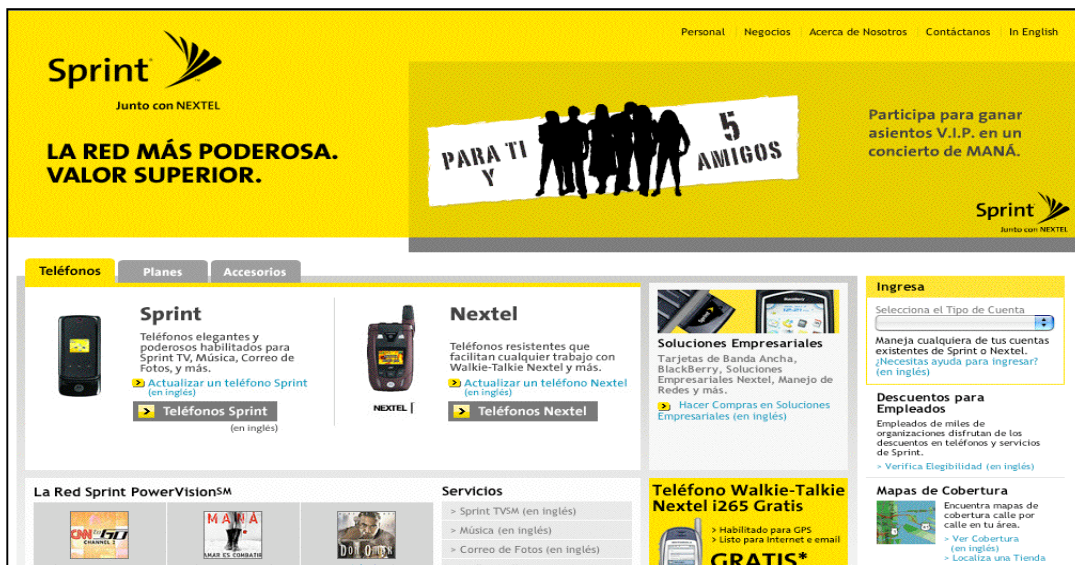
Global navigation can make or break a company's localized websites. Be sure to devote plenty of time to planning a strategy that speaks to all Web users, regardless of their language.

## Going Local: Spanish for the U.S.

Even if your company has no global aspirations just yet, you still may benefit from a Web localization strategy. With more than 30 million Spanish speakers in the U.S., companies are investing in localized websites to tap this potentially lucrative market.

The cellular carriers were among the first major companies to target the U.S. market. Today, you can find Hispanic U.S. websites across all major industries.

Image 1.8: Sprint Hispanic Site



Here are some of the companies that have developed Spanish-language websites for the U.S. market:

### Media/Internet

- ESPN
- Walt Disney World
- Yahoo!

### Automotive

- Chevrolet
- Ford
- Honda
- Nissan
- Toyota

**Telecommunications**

- Cingular
- SBC
- Verizon Wireless

**Travel/Tourism**

- American Airlines
- Avis
- Continental Airlines
- Hertz
- Holiday Inn
- Northwest Airlines
- Southwest Airlines
- Thrifty

**Financial Services/Insurance**

- Bank of America
- Citibank
- Geico
- State Farm
- Wells Fargo

**Retail**

- Crutchfield
- The Home Depot
- Lowe's
- Montgomery Ward
- Walgreens

**Does *Neutral Spanish* Work?**

There are many flavors of Spanish found in the U.S., from Mexican to Cuban to Puerto Rican. How do you address all Spanish speakers without having to provide several translations?

You use neutral, or universal, Spanish. Many translation agencies now provide this service. The process entails relying on translators and project managers who know how to avoid using certain words unique to one particular Latin American country. Neutral Spanish is not a perfect solution, but companies have generally reported favorable success with it.

# **PART II**

## **SURVEY RESULTS**

# About the Survey Respondents

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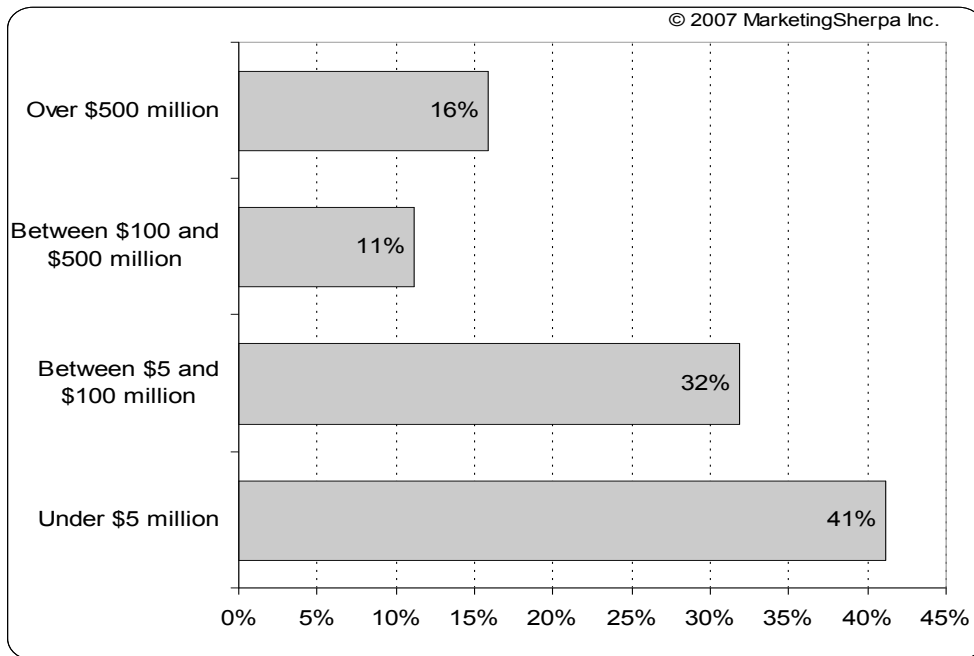
The following charts shed light on the respondents and on the companies they represent.

The most important indicator is the size of the company itself. Most companies that do more than \$1 billion in revenues have a global physical presence and, not surprisingly, a multilingual Web presence.

The majority of respondents represent companies that earn less than \$100 million. This percentage is significant, since many of the responses indicate that executives in these smaller companies are keenly aware of the importance of Web globalization and have plans to begin or expand their Web globalization efforts.

The Going Global Website Survey was fielded on March 9, 2007, to select MarketingSherpa lists and closed on March 16 with 1,939 qualified responses. Of those, 63% (1,229 responses) were from companies based in the United States, and 37% (710 responses) were from overseas companies.

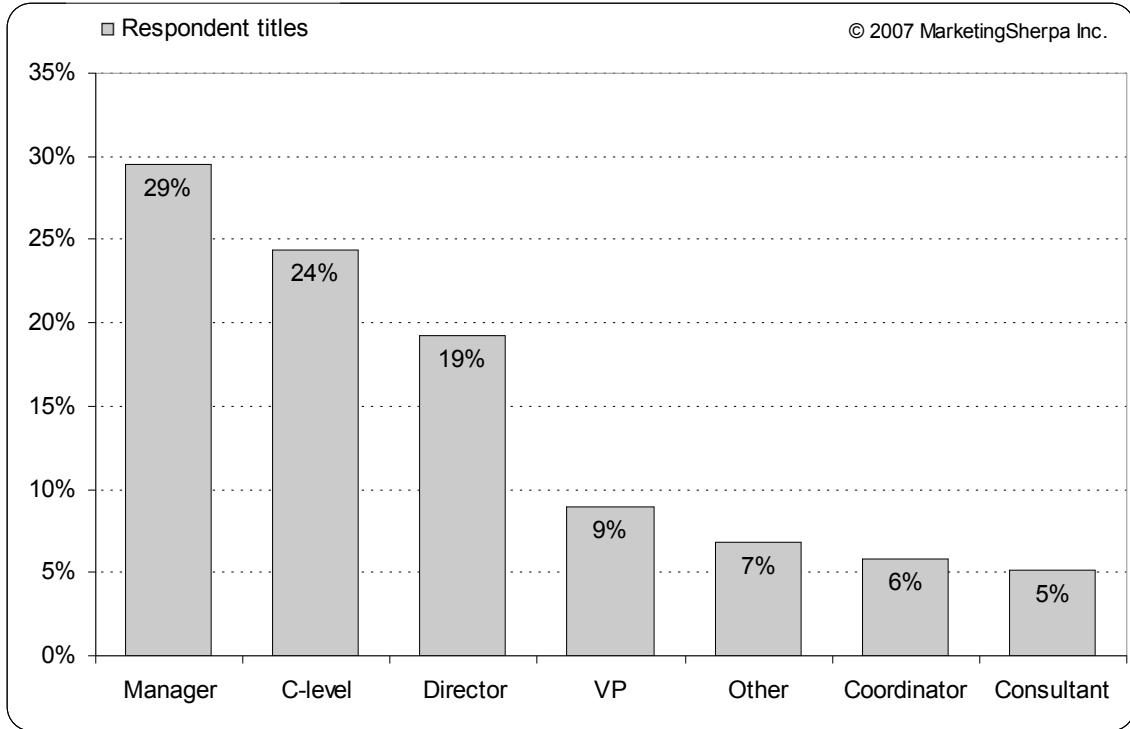
**Chart 2.1: Respondents by Total Revenues**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

The majority of survey respondents occupy high-level positions within their companies.

**Chart 2.2: Respondent Job Titles (U.S.)**

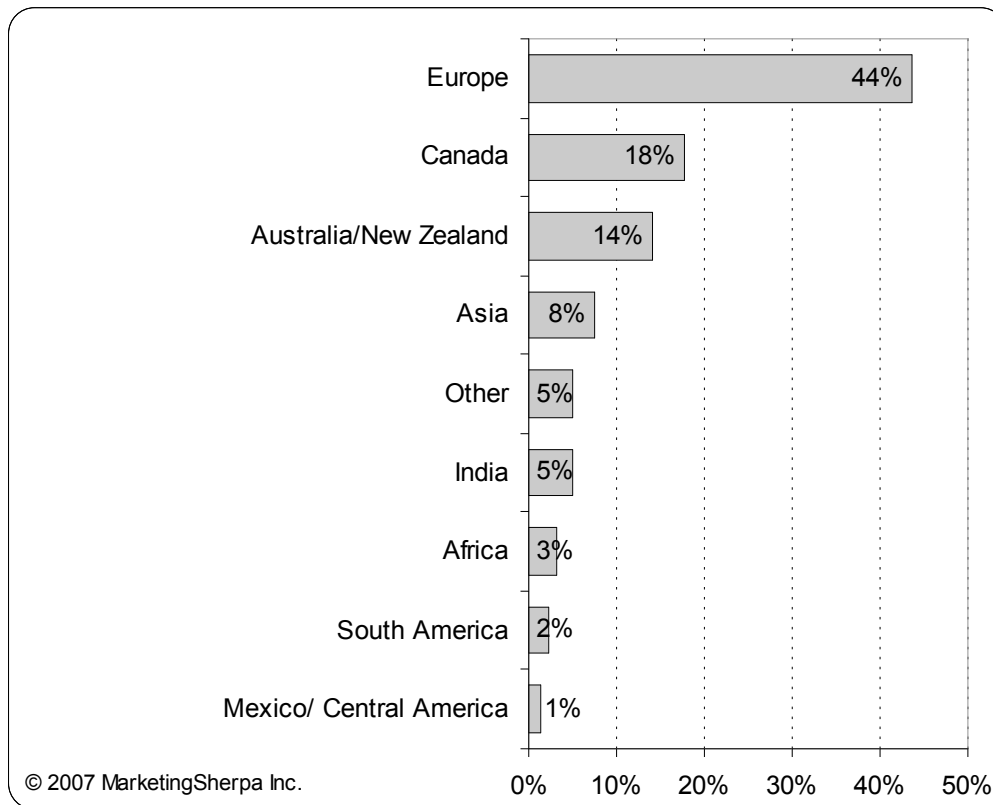


Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

Roughly 37% of the respondents were based outside the United States. Not surprisingly, Europeans represent the bulk of the respondents. Web globalization has been a fact of life in Europe for many years and has expanded in importance as the European Union has expanded its reach.

The European Union now supports 23 official languages, making its translation division the world's largest translation agency.

**Chart 2.3: Locations of Non-U.S. Respondents**



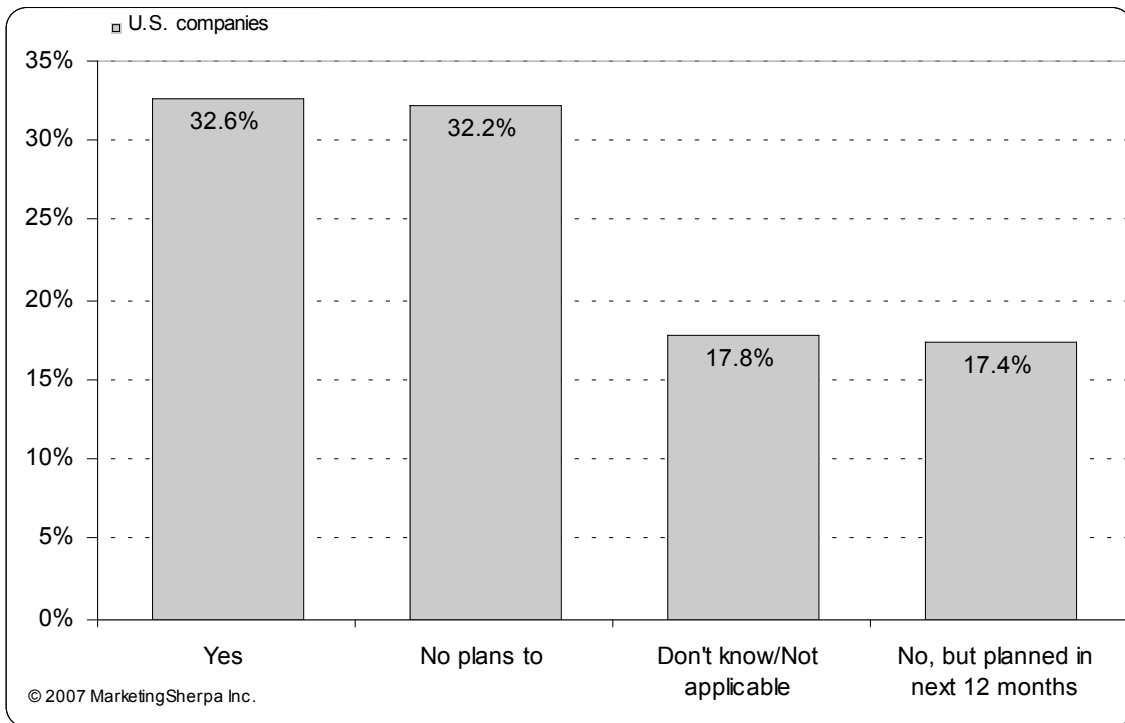
Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

Although our main focus for this report is on U.S. companies, we included a few key findings from the non-U.S. audience in the last section of this report.

# Companies Going Global

Based on the survey, Web globalization is past the “emerging” stage for many companies. Of the 1,229 U.S. respondents, more than 30% have already translated parts of or their entire website. Furthermore, an additional 17% plan to do so over the next 12 months.

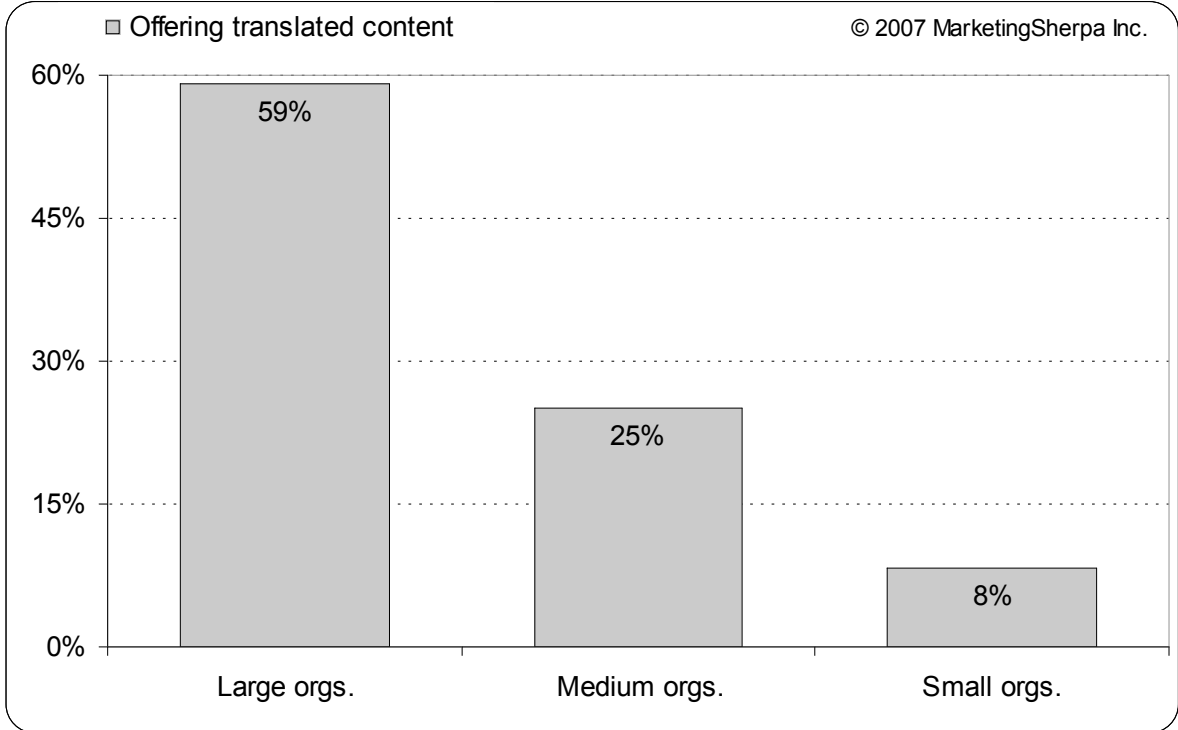
**Chart 2.4: Use of Translation in Website(s) – U.S. Companies**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

Here is how the companies that have already translated some or all of their websites break down by revenues.

**Chart 2.5: Use of Translation in Website(s) – U.S. Companies, by Revenues**



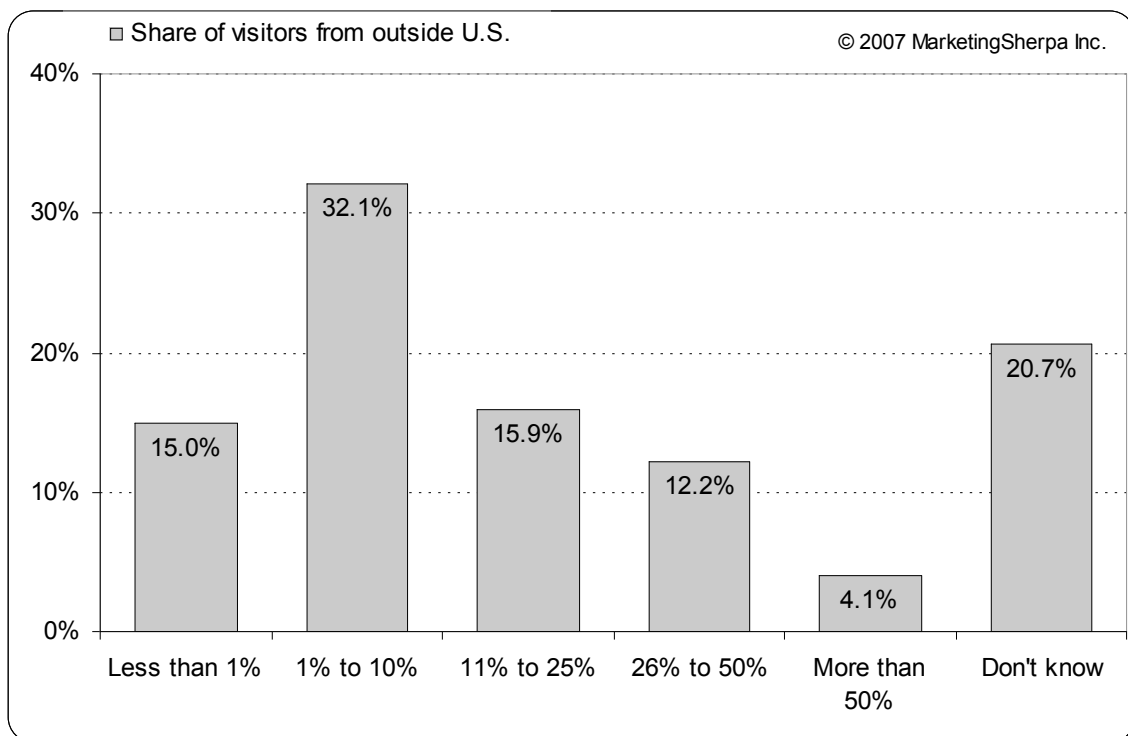
Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

Nor surprisingly, larger companies have invested more heavily in Web globalization. That's largely because translation costs are not a trivial expense, as we shall see later in the report.

A recent Byte Level Research study of global companies earning more than \$1 billion found that more than half of the Web traffic to their corporate (.com) sites originated from outside their home markets.

We wanted to know where our respondents stood in this regard. The percentages shown below correlate to the sizes of the companies. Small companies that are still in the early stages of expanding into new markets generally see less traffic from abroad, whereas companies that already have a large global presence see considerably more non-domestic traffic.

**Chart 2.6: Share of Visitors to Website(s) from Outside U.S.**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

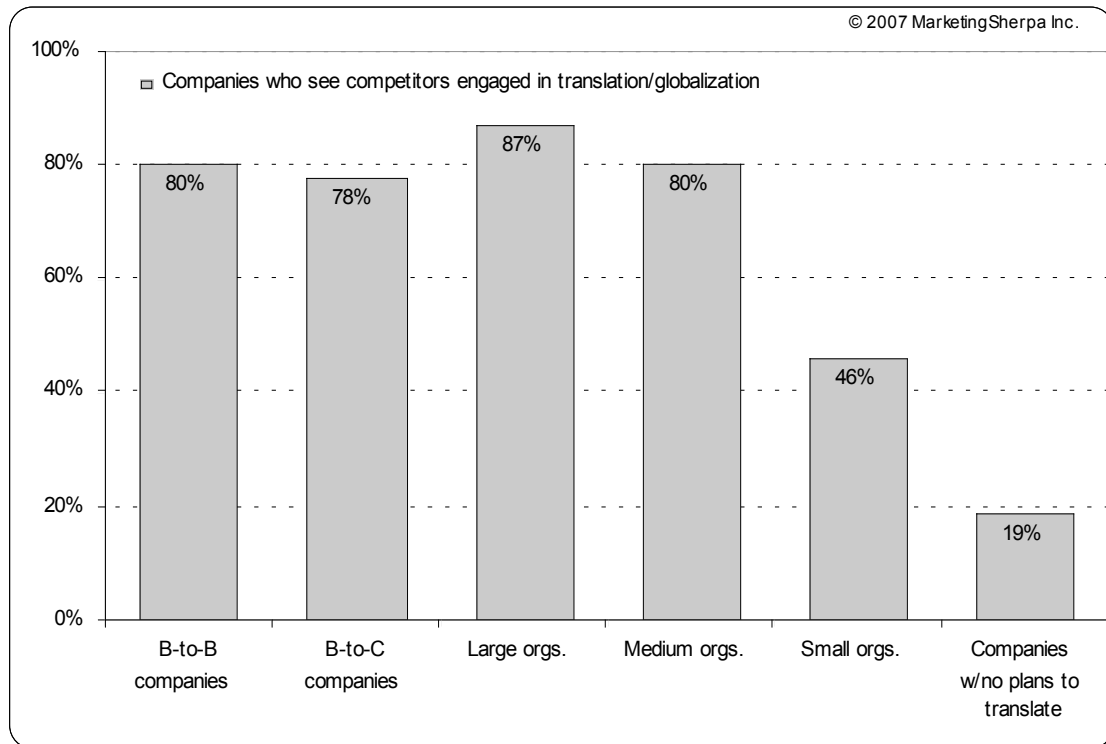
Web globalization provides companies with a competitive advantage, but not always for long.

One of the reasons that companies invest in Web globalization is to keep up with their competition. For example, Southwest Airlines was the first airline to launch a flight reservation engine in Spanish. Since then, four other airlines have followed along with similar websites.

We asked respondents if they were seeing Web globalization activity among their competitors. More than two-thirds of medium and large organizations report competitors engaged in Web globalization. Small companies report roughly 50%.

Not surprisingly, the companies that reported no plans for Web globalization also see very little competitive activity.

**Chart 2.7: Are Competitors Taking Their Websites Global?**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

# Challenges to Going Global

## Which Comes First: *Foreign Revenues or Foreign Websites?*

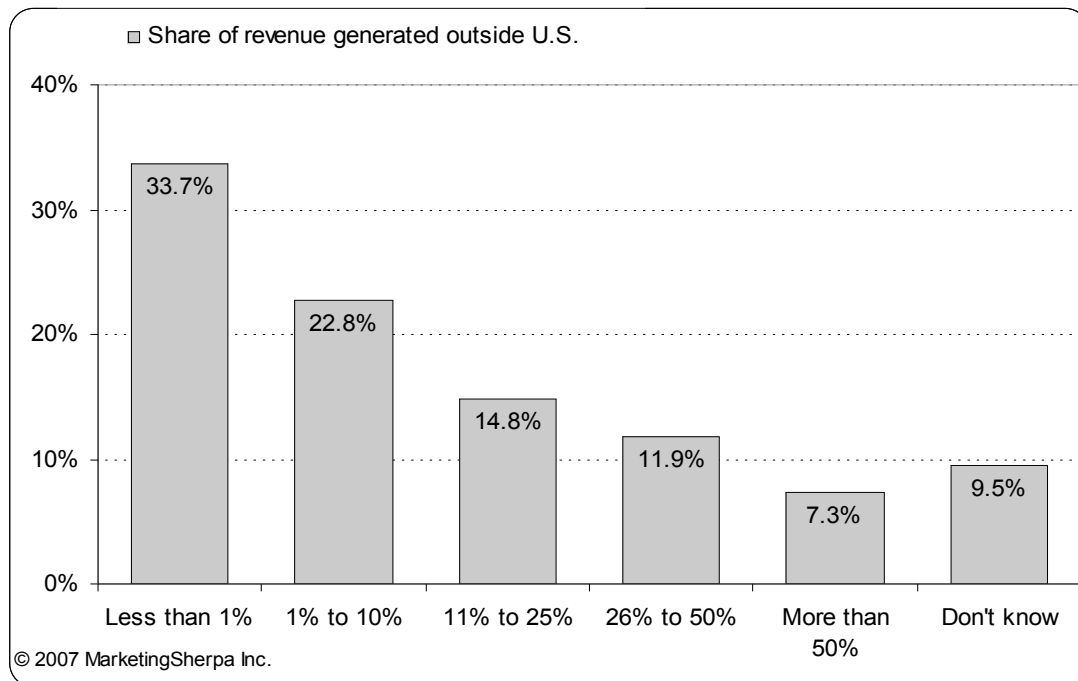
The classic “chicken and egg” paradox of Web globalization is that you need a localized website to drive foreign revenues, yet it’s difficult to justify spending on Web localization until a company sees the potential of foreign revenues.

The paradox is fueled by the fact that motivated and bilingual buyers will make do with English-only websites if this is all that’s available. And this fact sometimes creates the impression that no translation is necessary.

But there are clear signs that long-term growth requires a global growth strategy. Consider Intel, which generates more than 70% of its revenues from outside the U.S. Pure-play Internet companies are more revealing of this trend. eBay just reached the 50% benchmark, and Google could reach the 50% mark by 2008.

As shown here, most companies included in the survey do not see a majority of revenues from outside the U.S.

**Chart 2.8: Share of Revenues from Outside the U.S.**



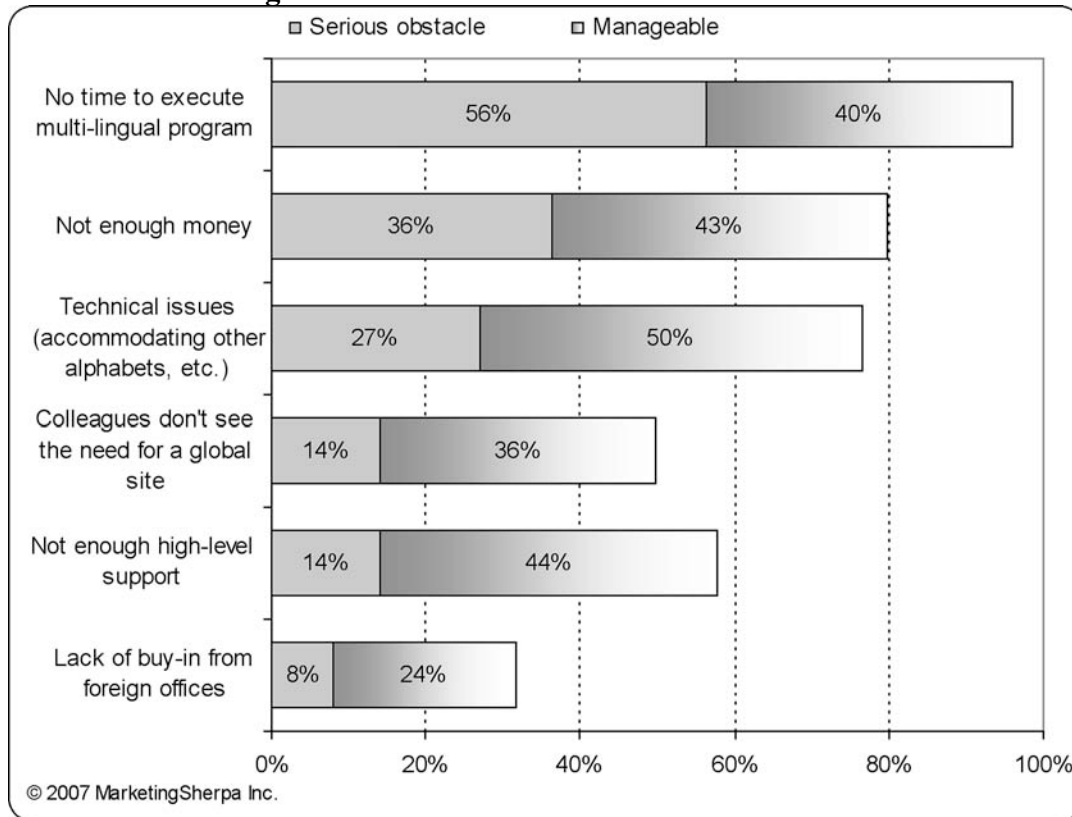
Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

Even though many companies see less than 10% of their revenues from outside the U.S., this survey finds that more than 30% have already invested in Web globalization to some extent.

**Lack of Time and Money**

Although lack of funds is a large obstacle to Web globalization, it is not the leading obstacle. More than half of all respondents point to a lack of time as the greatest problem.

**Chart 2.9: Challenges to Web Globalization**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

The technical challenges of Web globalization are much more easily surmounted than time and money issues.

# Languages

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If your goal is to communicate with most of the world, your website must support a core group of languages.

But what exactly are these languages?

First, let's start with the number of people. Currently, there are just over 1 billion people with Internet access around the globe. Based on our research, to communicate with 80% of these Internet users, you need to support the following 10 languages:

**Table 2.10: Internet Users (native language) and total users online**

<b>Lanugage</b>	<b>Total</b>
English	302,030,000
Chinese	129,170,000
Spanish	83,710,000
Japanese	80,000,000
German	50,750,000
Korean	37,500,000
French	34,600,000
Italian	29,000,000
Russian	24,500,000
Portuguese (Brazil)	24,000,000

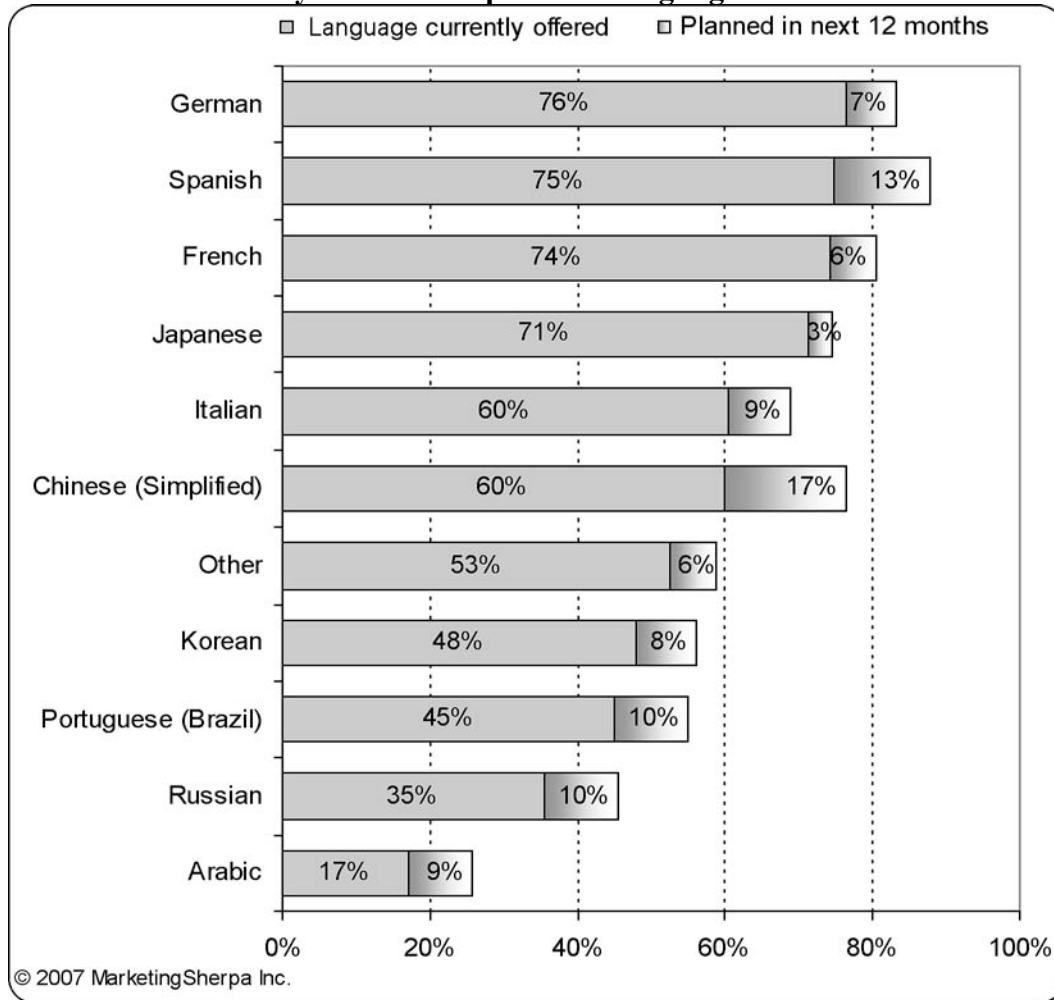
Source: Byte Level Research

Keep in mind that we're only focusing on people who have Internet access. As more of the world's population gets online, English will decrease in importance relative to other languages.

You don't have to see too far into the future to envision a world of 2 billion Internet users, of which nearly 500 million of these users are native-Chinese speakers. This point could arrive as early as 2015.

We asked respondents what languages their websites support. German is currently the most popular language supported, but Spanish is expected to overtake it within the next 12 months, and Chinese is gaining ground. Please note that Spanish may include Spanish for the U.S. as well as for markets in Latin America and Spain.

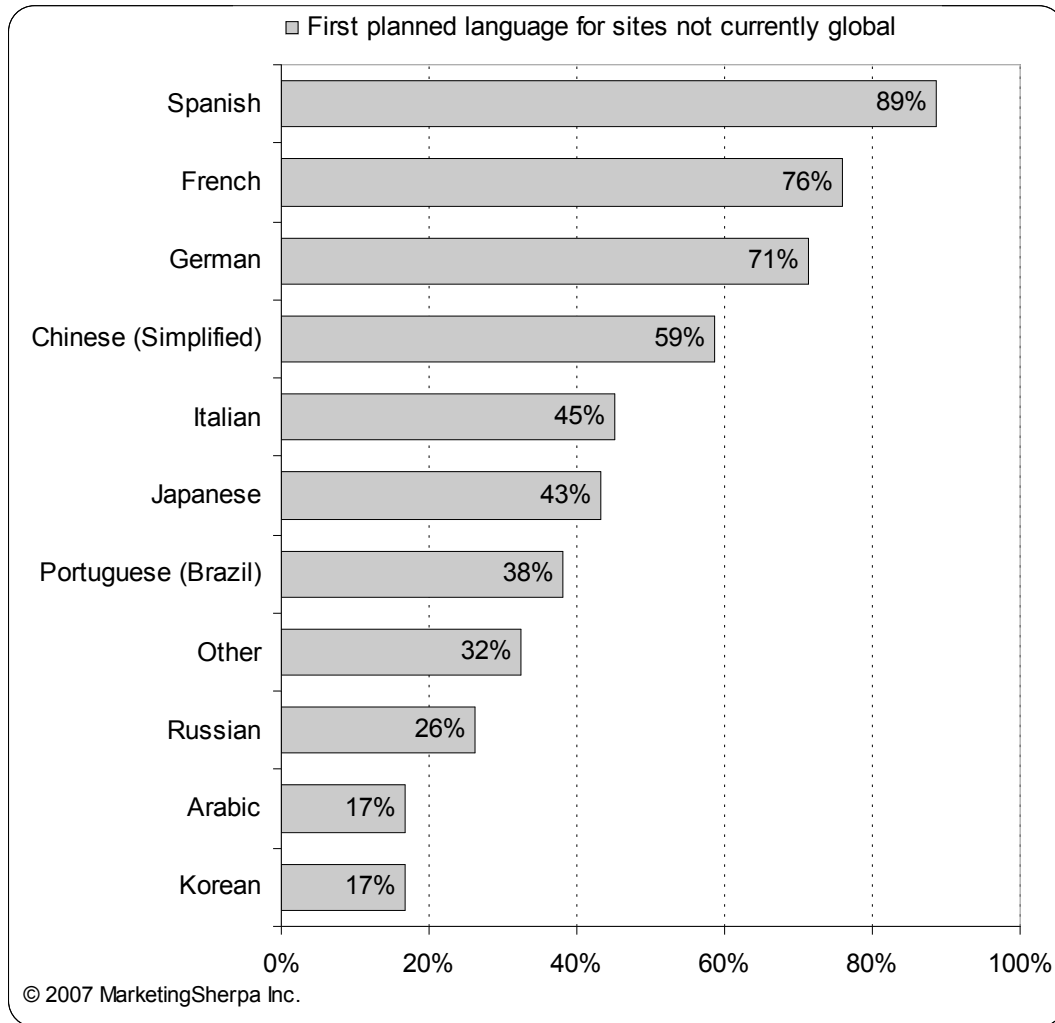
**Chart 2.11: Currently Global Companies – Languages Offered**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

We then asked companies that had not yet translated any Web content what their first language would be. Spanish emerged on top, followed by French, German and Chinese (Simplified).

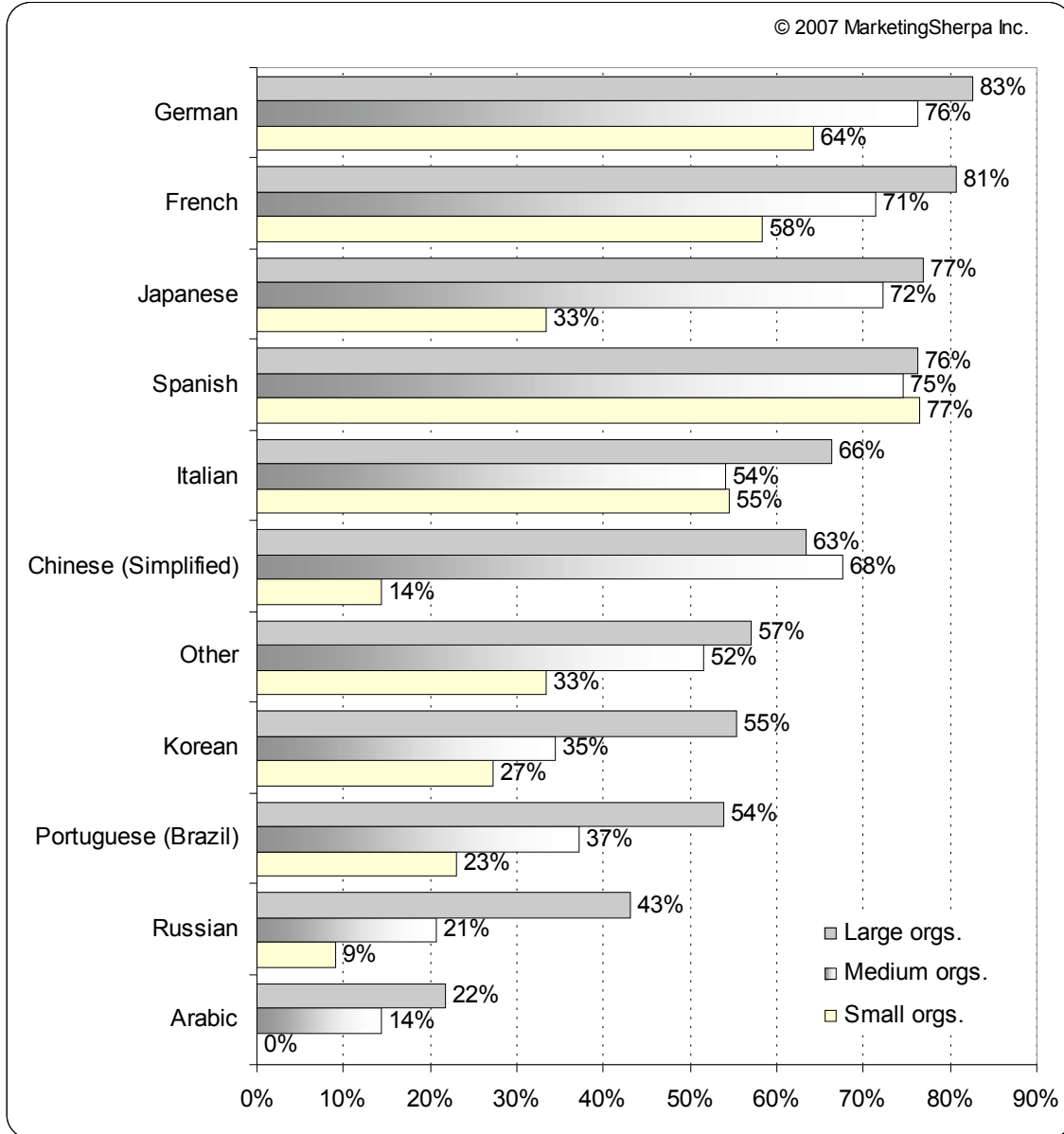
**Chart 2.12: Non-Global Companies – First Language Planned**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

When you look at language preference and company size, small companies show a preference for Spanish. We suspect this is largely due to the demand for Spanish translation for the U.S. market.

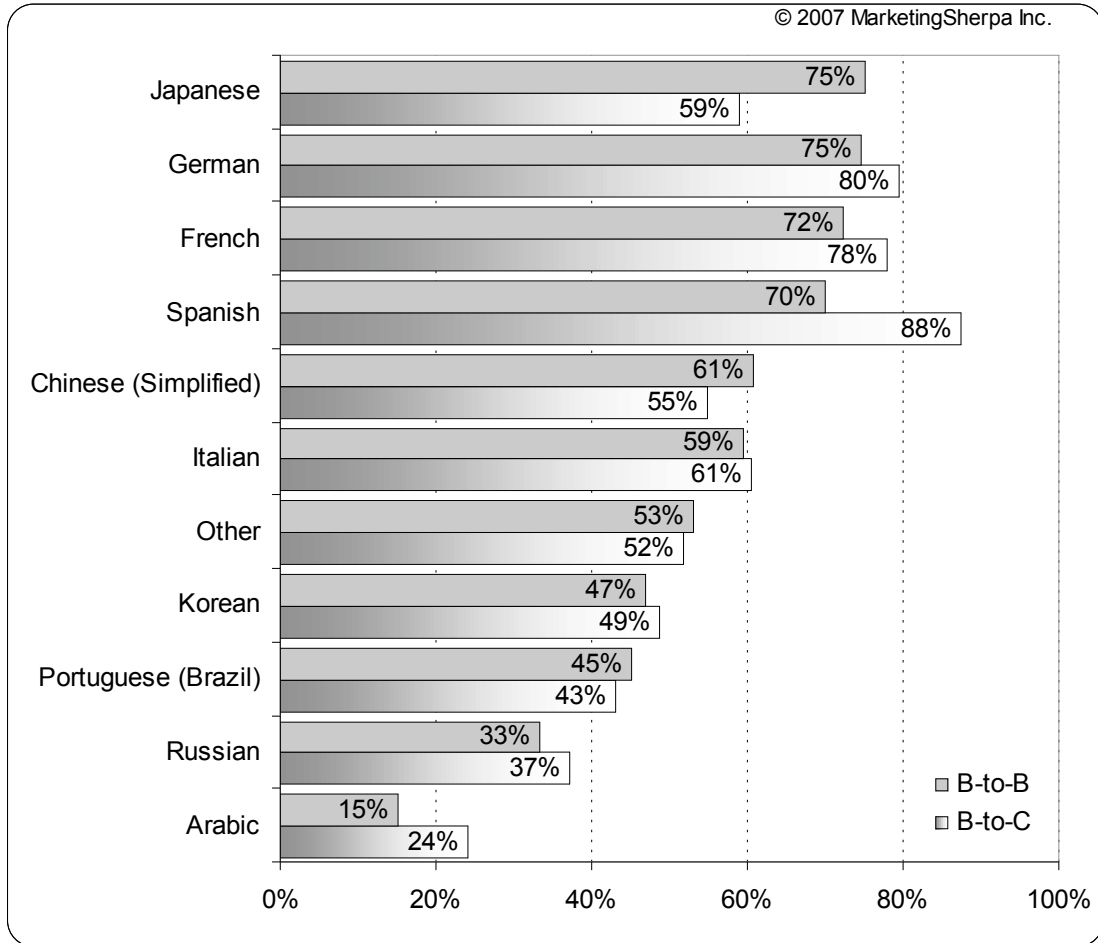
**Chart 2.13: Languages Offered by Company Size**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

Companies that focus largely on consumers have shown a strong preference for Spanish Web content, also related to the U.S. Hispanic market phenomenon.

**Chart 2.14: Languages Offered by B2B/B2C**



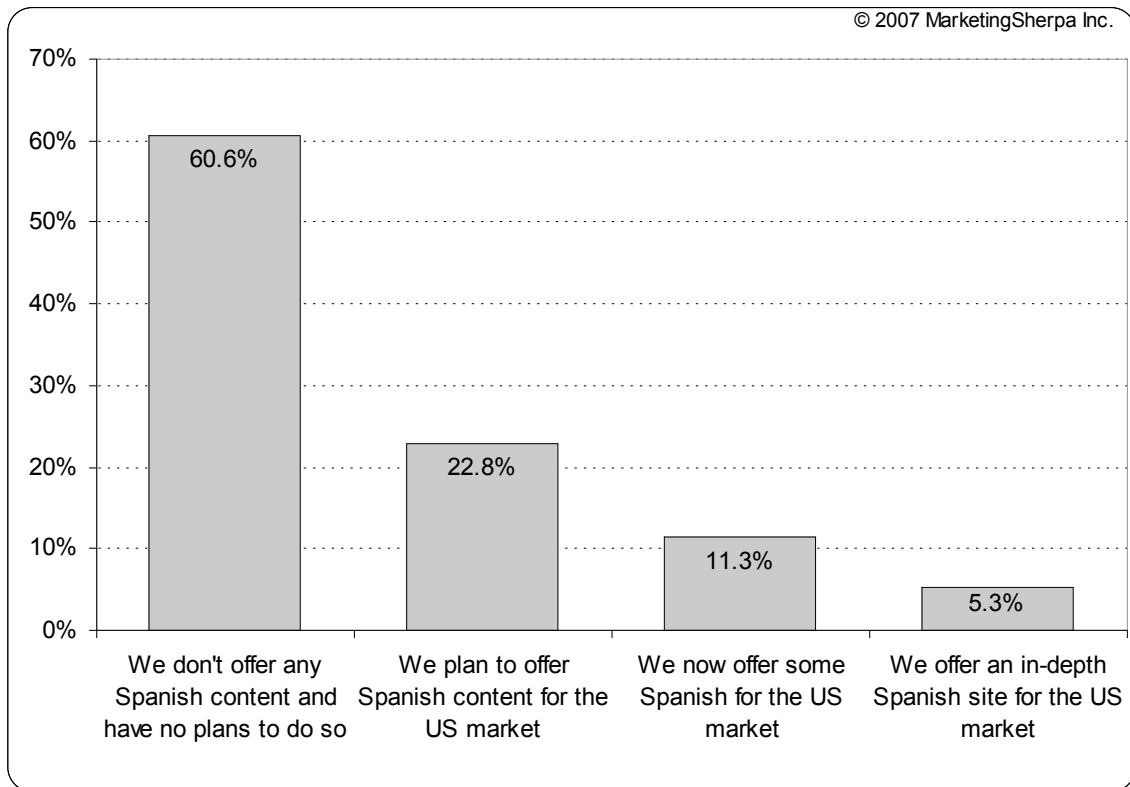
Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

## Spanish for the U.S.

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Although more than half of respondents don't offer Spanish content for the U.S. market, there is a clear trend of companies targeting the Hispanic market. More than 16% of U.S. respondents offer some Spanish-language content for the domestic market. And more than 22% plan to add Spanish content.

**Chart 2.15: Offering Spanish Content for U.S. Domestic Market**



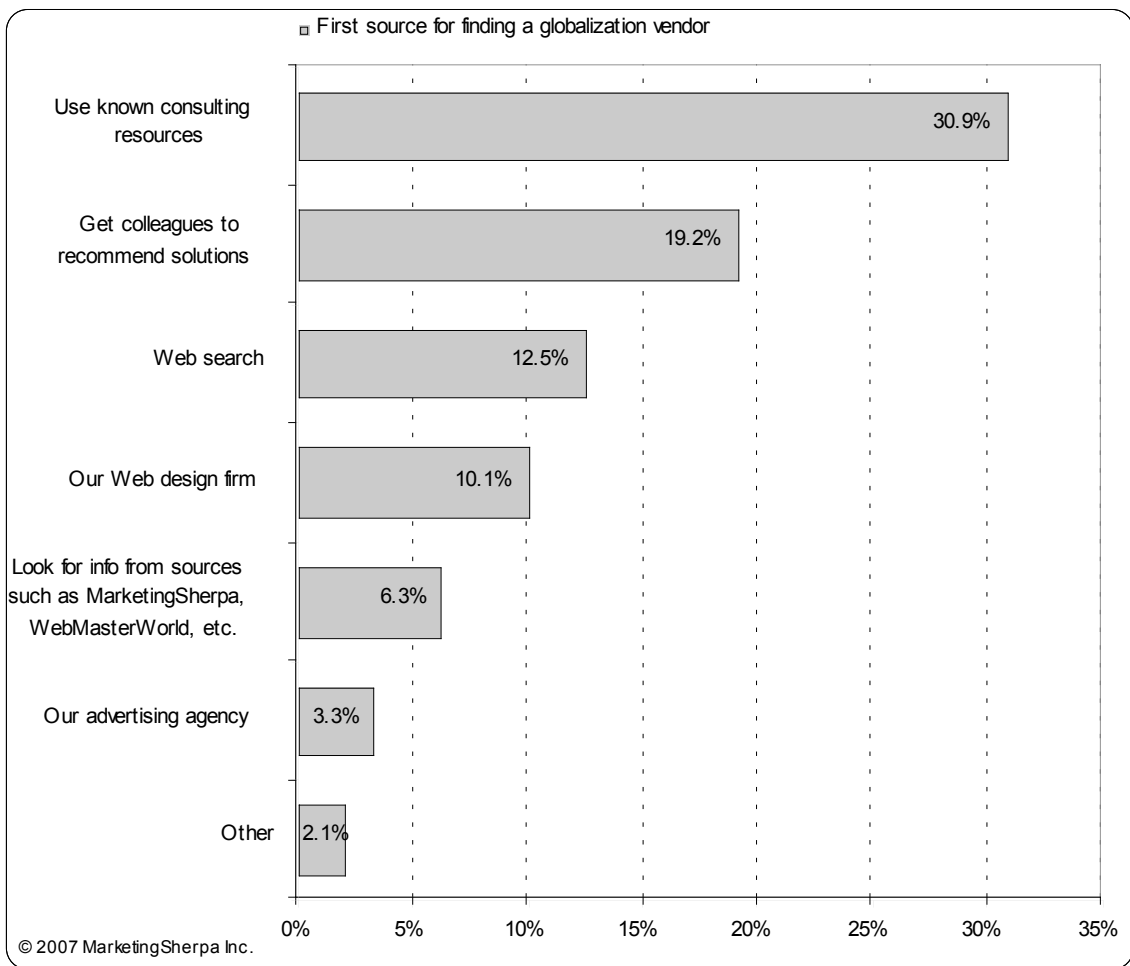
Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

# Finding a Vendor

Because Web localization is still a novelty for many marketing executives, we wanted to know where these executives would turn to first when they decide to find a vendor to help them go global.

As shown here, the first place most will look to is their existing consultants and colleagues.

**Chart 2.16: How Companies Would First Seek Information on Going Global**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

Many companies already have relationships with freelance translators and translation agencies, so it's natural to begin here. However, it's also important that

companies seek out translation agencies with demonstrated experience with Web globalization.

Many translation agencies specialize in areas that may not include websites, so be sure always to ask for samples of past work and to speak with references at companies that have already taken their websites global. These conversations may also be valuable in highlighting additional tips and strategies that your company can use.

### **Who are the Largest Web Globalization Vendors?**

The translation industry is very fragmented, with most agencies privately owned and earning between \$5 million and \$15 million per year. Only two agencies are publicly owned: Lionbridge and SDL.

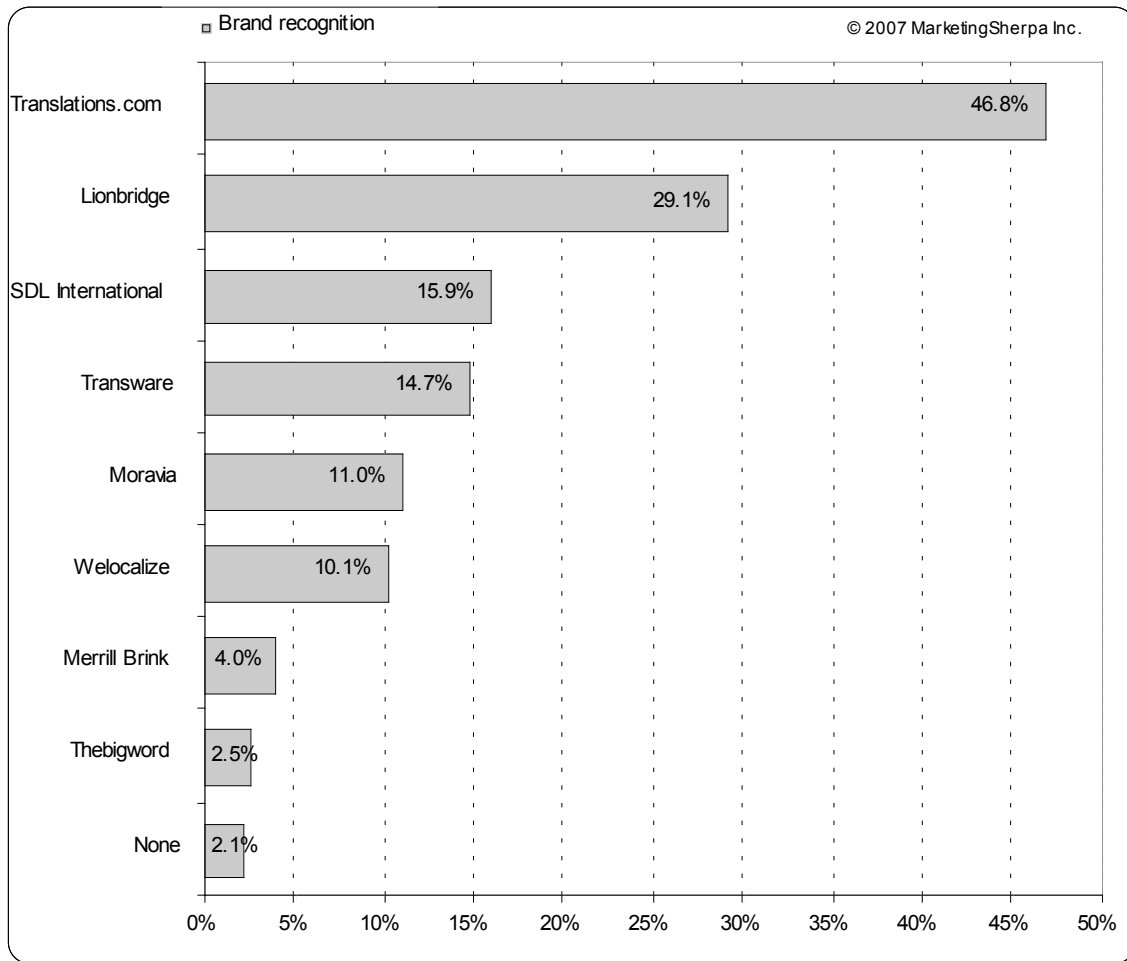
Here is Byte Level Research's estimate of the leading Web globalization agencies based on revenues:

1. Lionbridge (<http://www.lionbridge.com>)
2. SDL International (<http://www.sdlintl.com>)
3. Translations.com (<http://www.translations.com>)
4. Welocalize (<http://www.welocalize.com>)
5. Thebigword (<http://www.thebigword.com>)
6. Merrill Brink (<http://www.merrillbrink.com>)
7. Moravia (<http://www.moraviaworldwide.com>)
8. Transware (<http://www.transware.com>)

This list includes only agencies that have extensive expertise in Web globalization and generate the majority of their revenues from the corporate sector.

We included this list in the survey and asked respondents to select any agencies that they recognized. The sorting of the list was randomly generated for each respondent.

**Chart 2.17: Name Recognition of Web Localization Agencies**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

### Size Isn't Everything

As we can see here, Lionbridge and SDL, although larger than Translations.com, are not as well-recognized.

It could be due to the name itself. Translations.com certainly can't be confused with a Web design shop.

The larger issue here is that there was no one company that garnered more than 50% of the awareness level. No vendors can claim to be a "household name" – at least not yet.

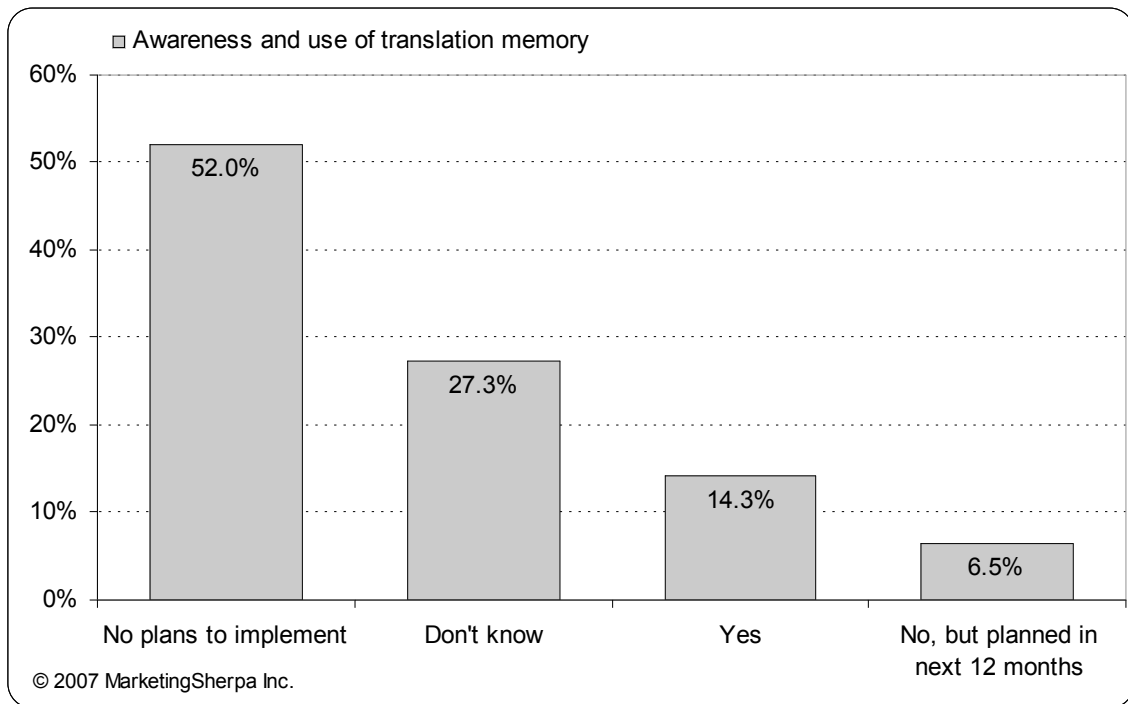
## What's Translation Memory Software?

As you will see in the next section, translation can be quite expensive. Companies have been increasingly using translation memory (TM) software to help them save money on translation.

TM software captures previously translated text and reuses it, so that a human translator does not have to translate the same text again. For example, many Web pages use a fair amount of repeatable “boilerplate” text. If a new Web page is created, it makes sense to simply reuse the text that has already been translated rather than pay for those additional words.

To be truly effective, TM software, requires a large repository of translated text, which means this is not a tool for a company new to translation. But companies that have been managing translation for a number of years and have built a large database of words can cut their translation costs by as much as 50%.

**Chart 2.18: Awareness/Use of Translation Memory Software**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

As shown here, awareness of TM software is low, but it is growing at a relatively robust pace. The dominant TM software tool is called Trados and is owned by SDL, which also provides translation services.

# Translation Spending

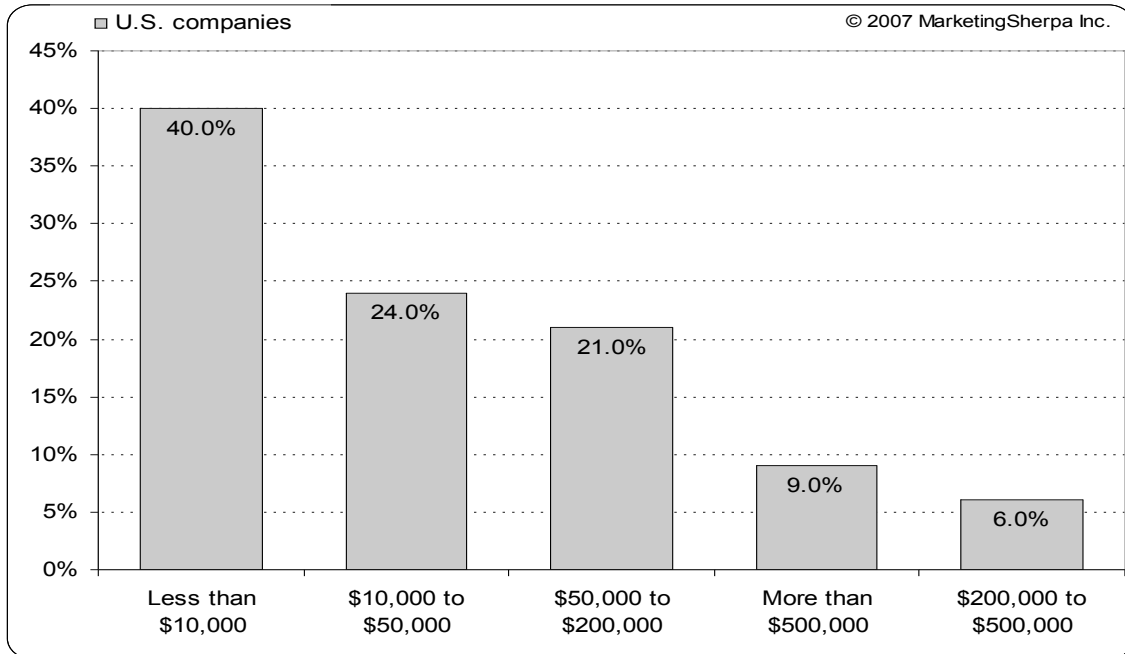
The baseline for planning a translation budget is the cost of translating a word from one language into another. For example, it may cost a company \$0.20 to translate an English word into Spanish. Naturally, the per-word cost will decrease as the volume of the project increases.

If we assume that a company has a 20,000-word website that needs to be translated into Spanish, at \$0.17 per word the project would cost at least \$3,400 before project management costs are figured in, which might add another \$1,000. But much depends on the complexity of the site itself. If several text strings are scattered about an interactive Web application, such as a shopping cart, an engineer must locate these as well and test the software. Every visual that has embedded text must be re-edited with the translated text.

As a result, it's not unusual to see a company spend \$10,000 for a minor one-language Web localization project. If a company wishes to support five or 10 languages, including more expensive language, such as Japanese or Arabic, the costs of the project can exceed six figures.

We asked respondents how much money they have spent on translation, shown here:

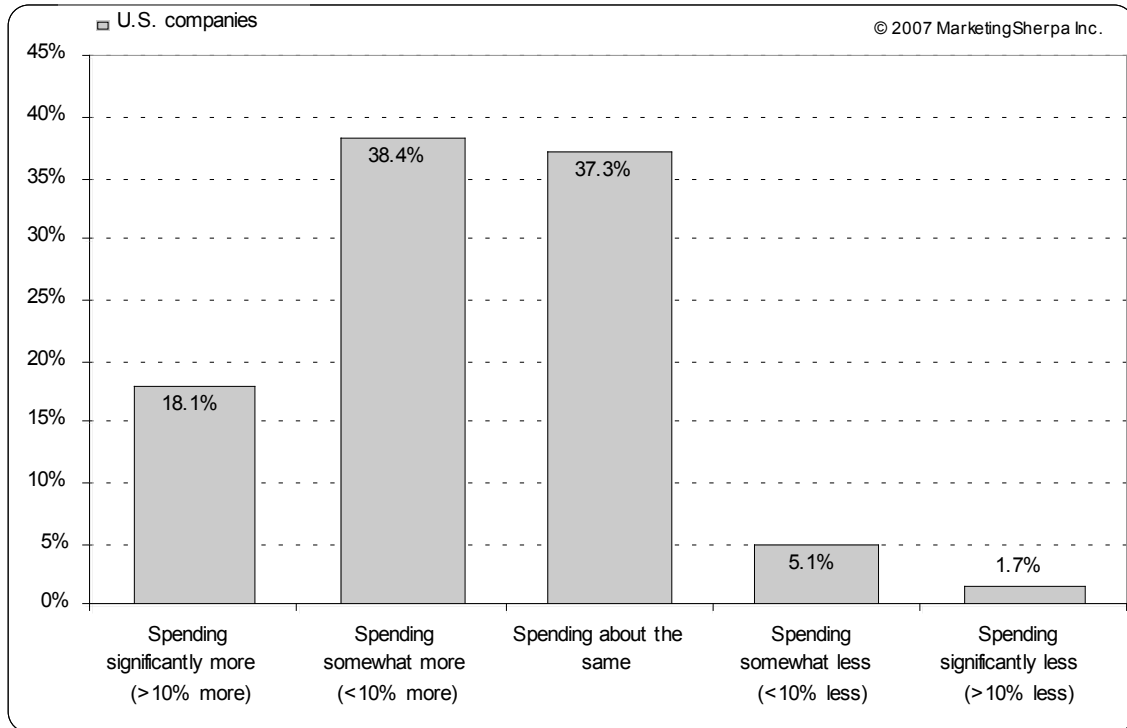
**Chart 2.19: Money Spent on Translation**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

More than half have spent less than \$50,000. But, more importantly, spending plans are going up. Roughly half of all respondents have plans to increase translation spending.

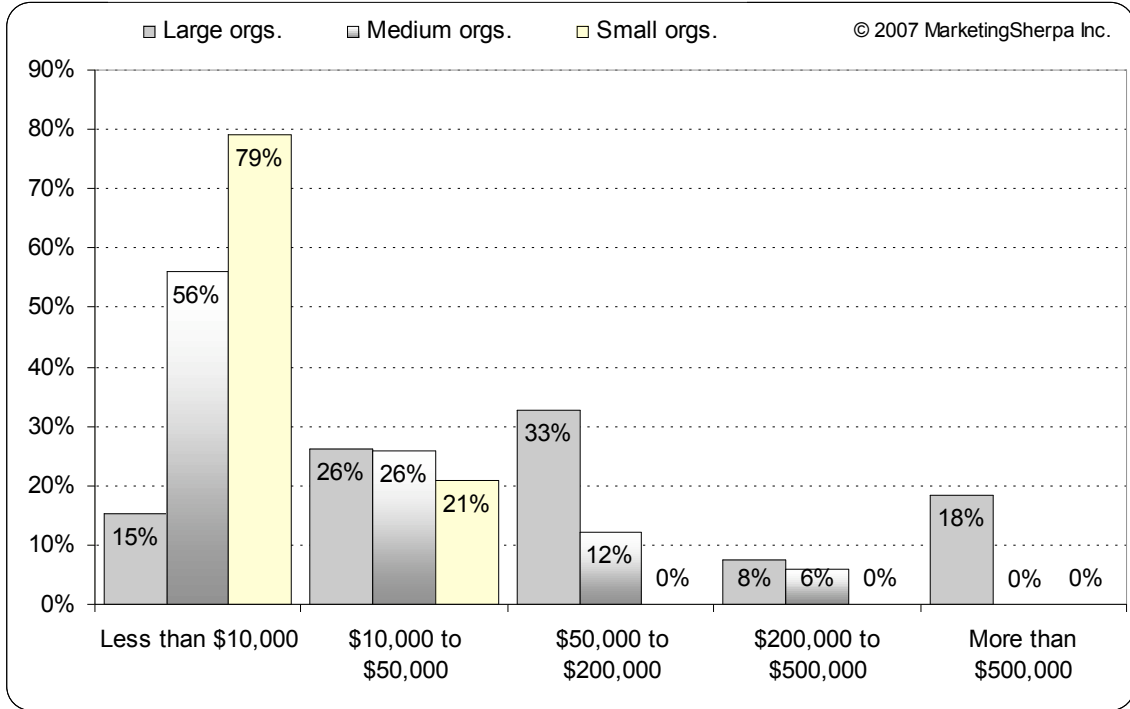
**Chart 2.20: Spending Plans – U.S. Companies**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

Not surprisingly, large companies have allocated the largest budgets for Web globalization – 18% of all large organizations surveyed spend more than \$500,000.

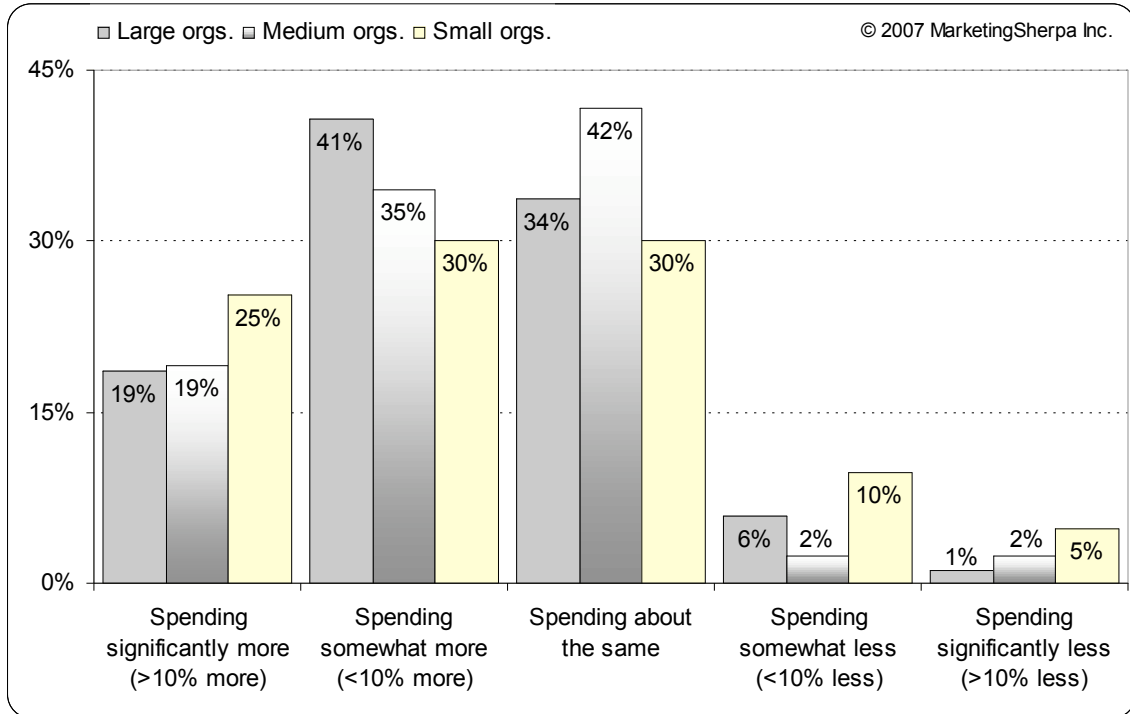
**Chart 2.21: Translation Spending by Company Size**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

Spending plans are expected to increase at companies of all sizes. However, small companies show the greatest interest to “significantly” increase their translation spending.

**Chart 2.22: Spending Plans by Company Size**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

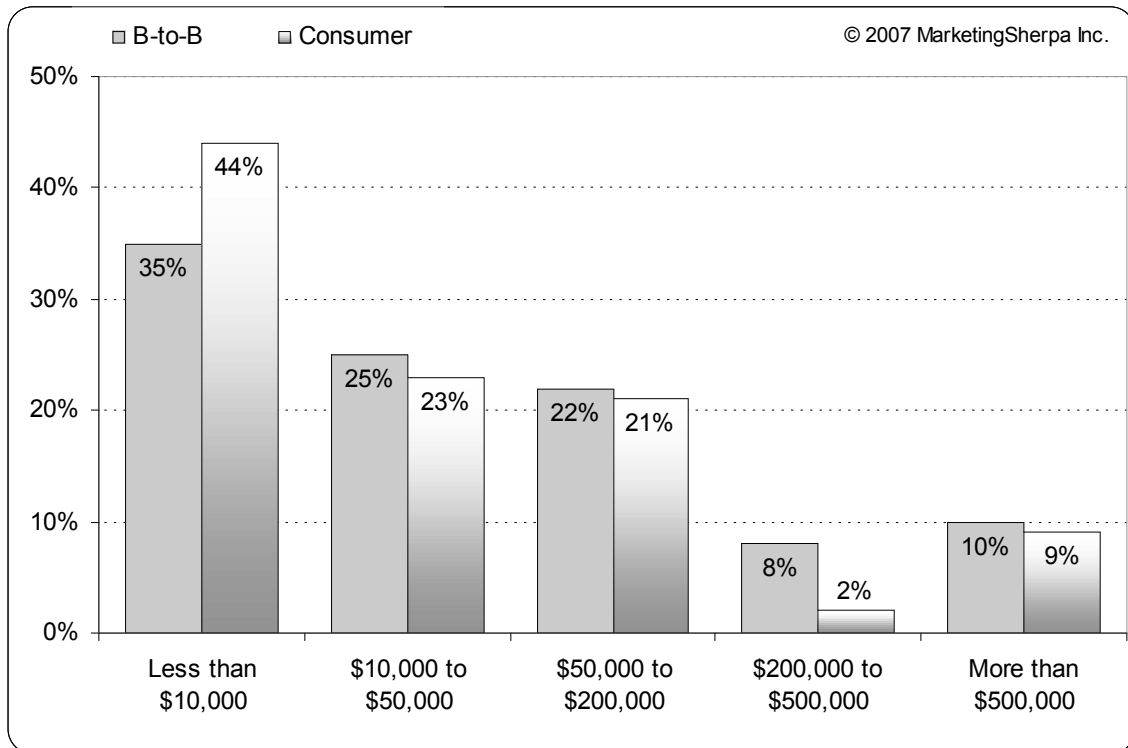
### Translation Spending: Consumer vs B2B

In the early days of Web globalization, many companies in the B2B space did not see a strong need for translation, particularly in the financial sector, where English is commonly used around the globe.

Consumer-oriented companies saw the need for translation early on. But, based on the following two charts, no major difference in spending exists between B2B or consumer companies.

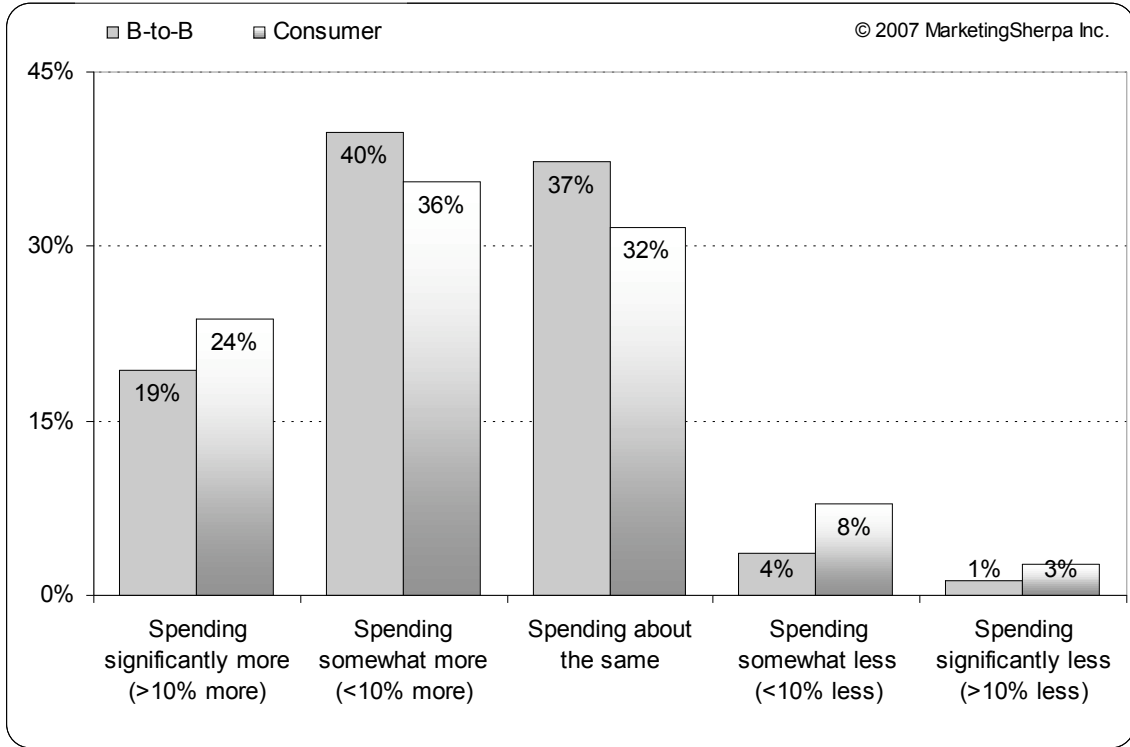
Although English is a *lingua franca* of global business, most people prefer to be addressed in their native language, particularly when the time comes to make a purchase.

**Chart 2.23: Translation Spending by Target Consumer**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

**Chart 2.24: Spending Plans by Target Consumer**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

# Marketing and ROI

Once you've launched a localized website, it's time to start marketing it. Keyword advertising is one popular method to drive traffic to your site.

Google, shown here, allows companies to post keywords in more than a dozen languages. So, if you have a Chinese-language website, you could upload a keyword advertisement in Chinese and set it so only users in China view the ad. When they select the ad, they will be taken to the localized website.

**Image 2.25: Google Chinese Keyword**

Google AdWords

中文

## 在 Google 上为公司做广告

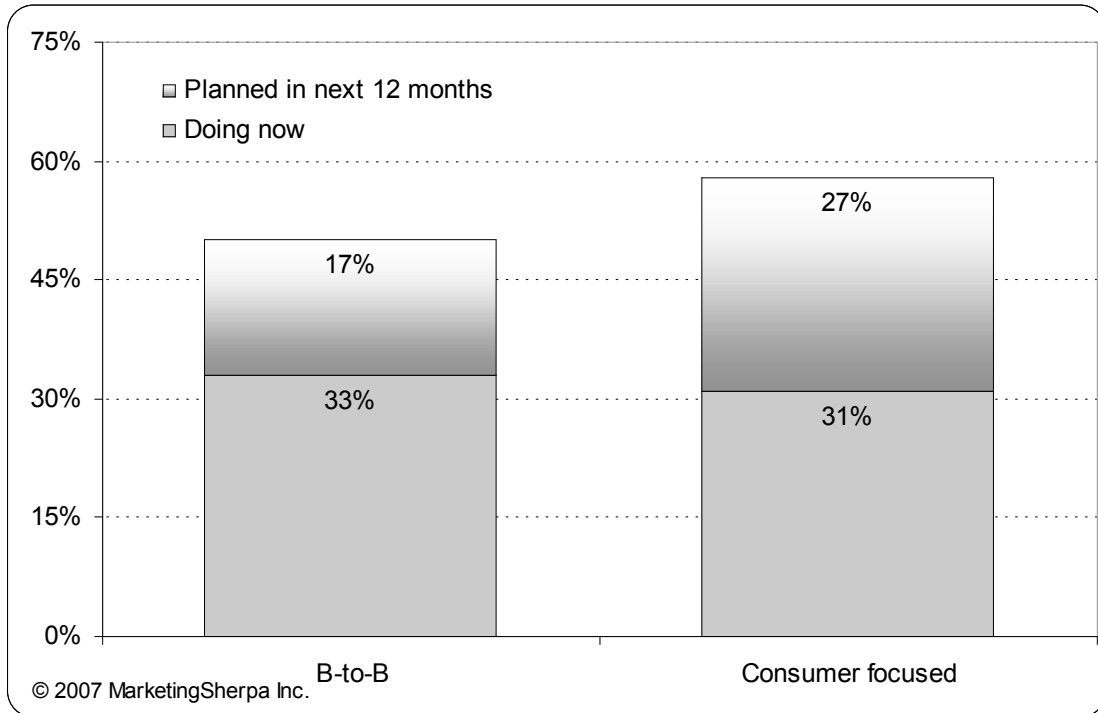
无论您的预算是多少，您都可以在 Google 和我们的广告联网中展示广告。仅当有人点击您的广告时，您才需要支付费用。

您的广告在相关的搜索结果旁显示...      人们点击您的广告...      ...连接到您的公司

这里是您的广告到 Google 以及合作伙伴网站上查看您的广告。  
[www.your-url.com](http://www.your-url.com)

We asked respondents if they were using multilingual AdWords or a comparable service. We were surprised to see that more than 30% of respondents already use multilingual AdWords. By next year, more than half of the consumer-focused companies surveyed plan to be using multilingual keyword advertising.

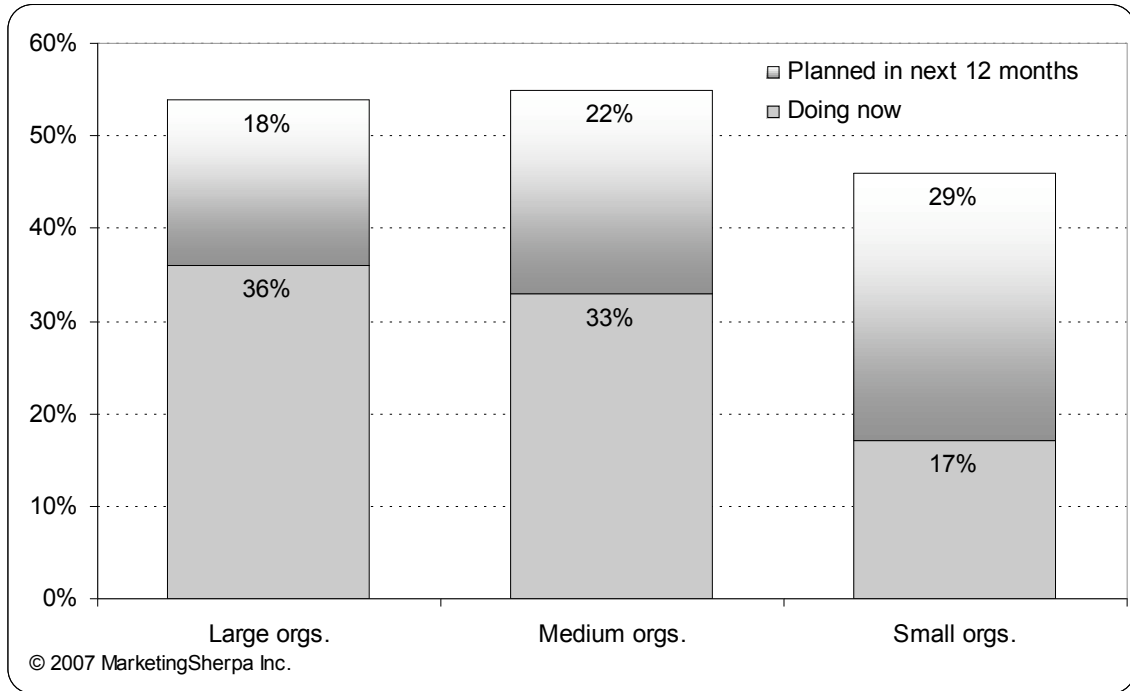
**Chart 2.26: Multilingual AdWords or Similar Service by Target Customer**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

Here are the same respondents broken out by company size. It was interesting to see nearly as many medium-sized companies using multilingual keywords as large companies.

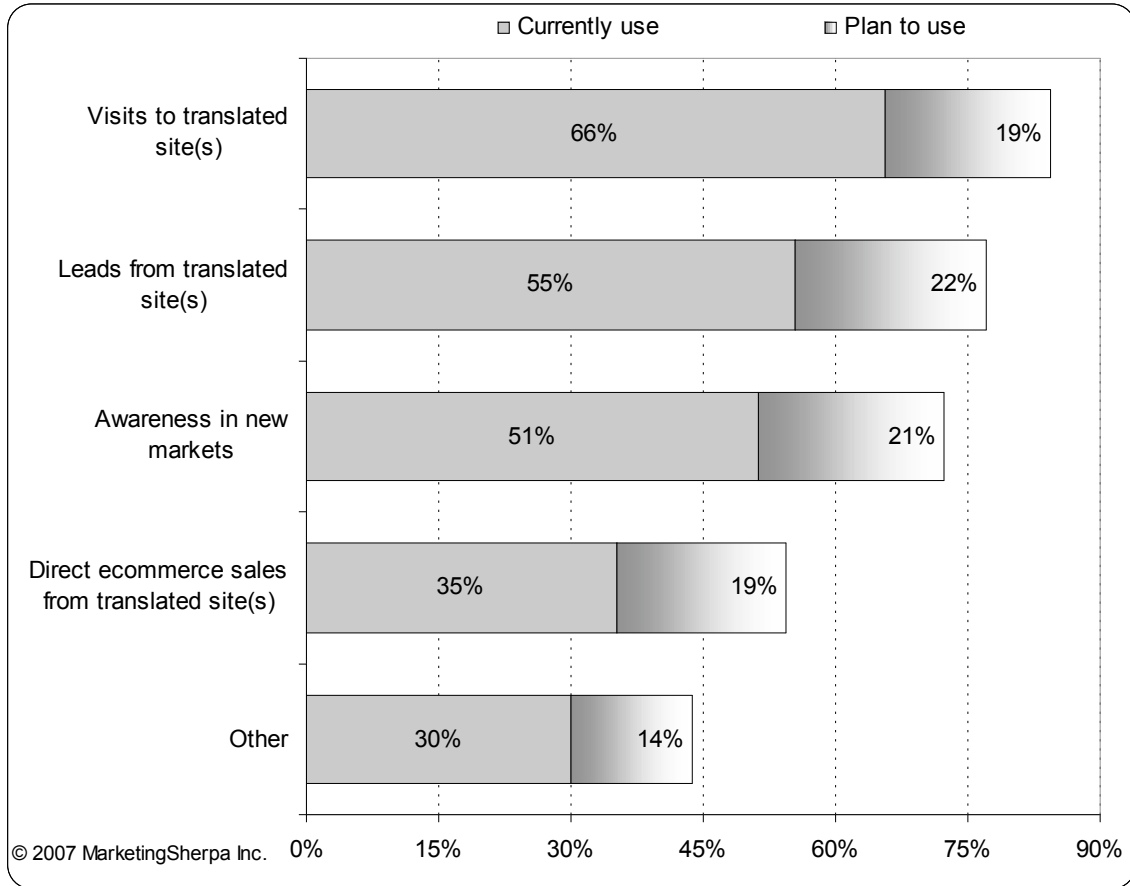
**Chart 2.27: Use of Multilingual AdWords (or similar programs)**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

We then asked how executives measure the return on investment of their global efforts. The majority rely on Web traffic and leads generated as the two major metrics.

**Chart 2.28: How ROI From Global Efforts Is Measured**



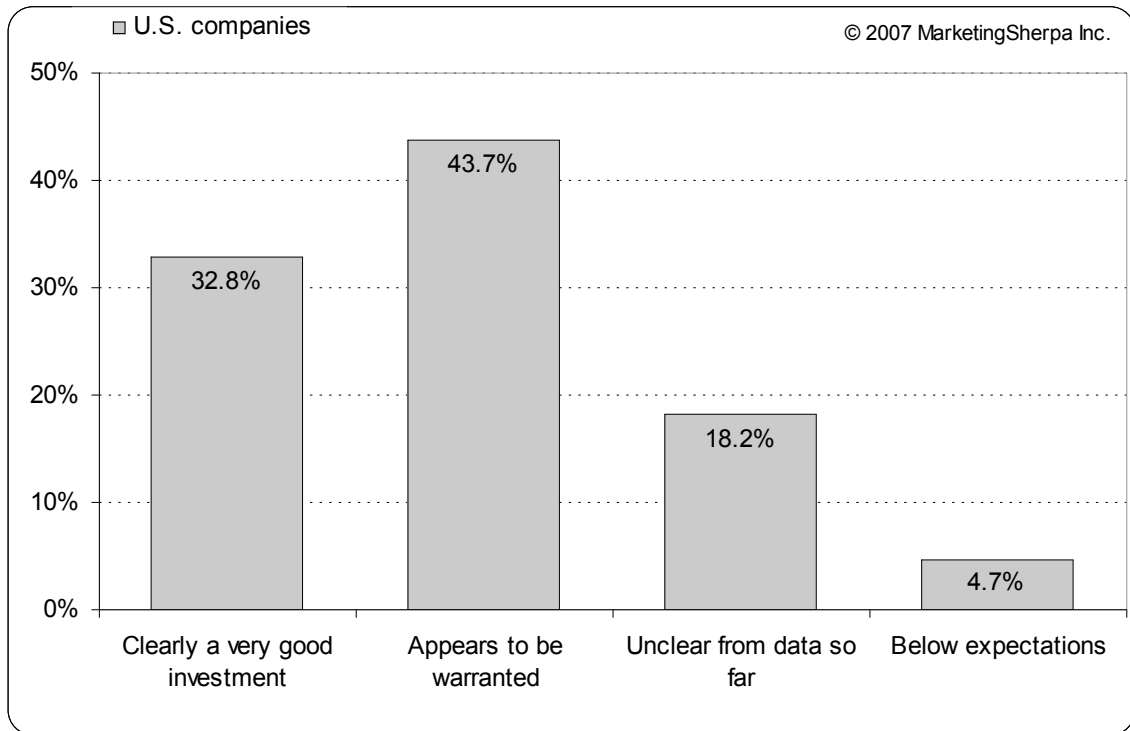
Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

### Web Globalization Is Worth It

We wanted to know if executives who had already invested in Web globalization thought the money was well spent.

As shown here, one-third of respondents felt strongly that the expense was worth it, and another 40% agreed, though a bit less enthusiastically. This data is good news for companies that are still debating the merits of getting started. Most executives who have invested in Web globalization have no regrets in doing so.

**Chart 2.29: ROI Evaluation – U.S. Companies**

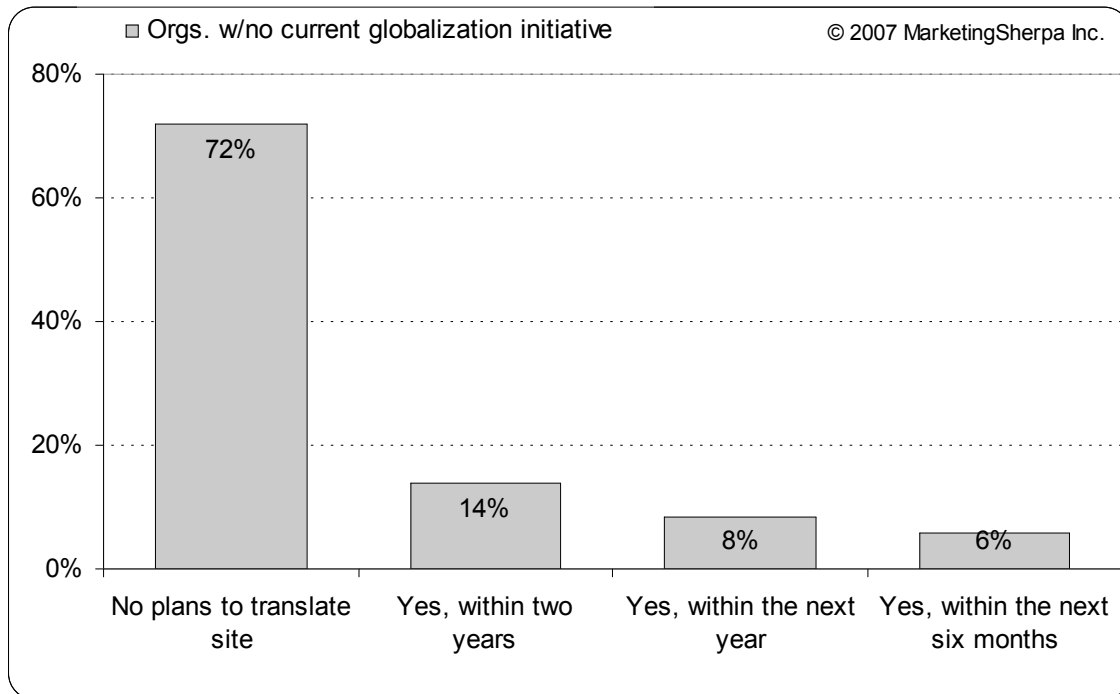


Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

## Companies Not Going Global

About half of the U.S. respondents do not offer multilingual websites yet. But, according to the following exhibit, an additional 30% of these websites will be multilingual over the next two years.

**Chart 2.30: Translation Plans of Websites That Have Not Gone Global**



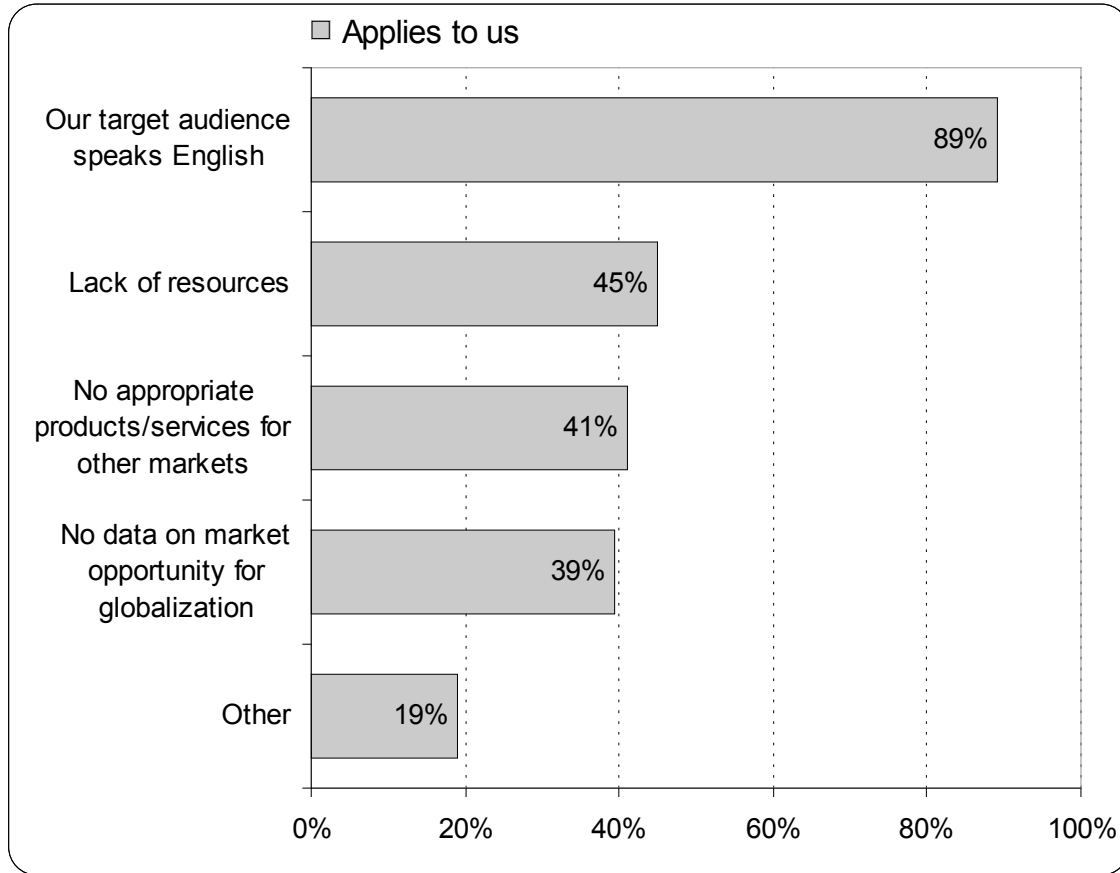
Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

However, this still leaves quite a few companies that don't have plans to translate their websites.

Why is that?

Most respondents believe that translation is not necessary because most of their audience speaks English.

**Chart 2.31: Reasons for Not Translating Website**



Source: MarketingSherpa & Byte Level Research, Going Global Website Survey, March 2007

As companies expand into markets where English is not widely spoken, we expect this percentage to drop.

## About Byte Level Research

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Founded in 2000, Byte Level Research ([www.bytelevel.com](http://www.bytelevel.com)) is a research and consulting firm that helps companies create websites that successfully speak to the world, across languages and borders.

Since 2003, we have published "The Web Globalization Report Card," an annual benchmarking of the websites of more than 300 multinationals.

In addition, we publish Global by Design ([www.globalbydesign.com](http://www.globalbydesign.com)), a subscription newsletter and website devoted to best practices.

Subscribers include Autodesk, Avaya, Caterpillar, Deloitte, Google, and The World Bank.

Most recently, Byte Level launched the "Local by Design" country localization series, with the first report focused on Brazil.

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**fax:** 253-550-2019  
302 Washington Street, #806  
San Diego, CA 92103

## About MarketingSherpa

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