Survey of the Global Translators Community 2014

Results

Results of the spring 2014 global survey on trends and attitudes in the freelance translation sector. A survey conducted by LingoIO in cooperation with academics and translators around the globe.

Content:

Introduction

Few industries are as diverse and heterogenous as the translation industry. A myriad of different types and sizes of language service providers, producers of translation software, small startups, translation platforms, crowd translation interfaces, big data, small translation offices, independent freelancers - the field is vast. How can we understand where the language industry is headed without studying its participants?

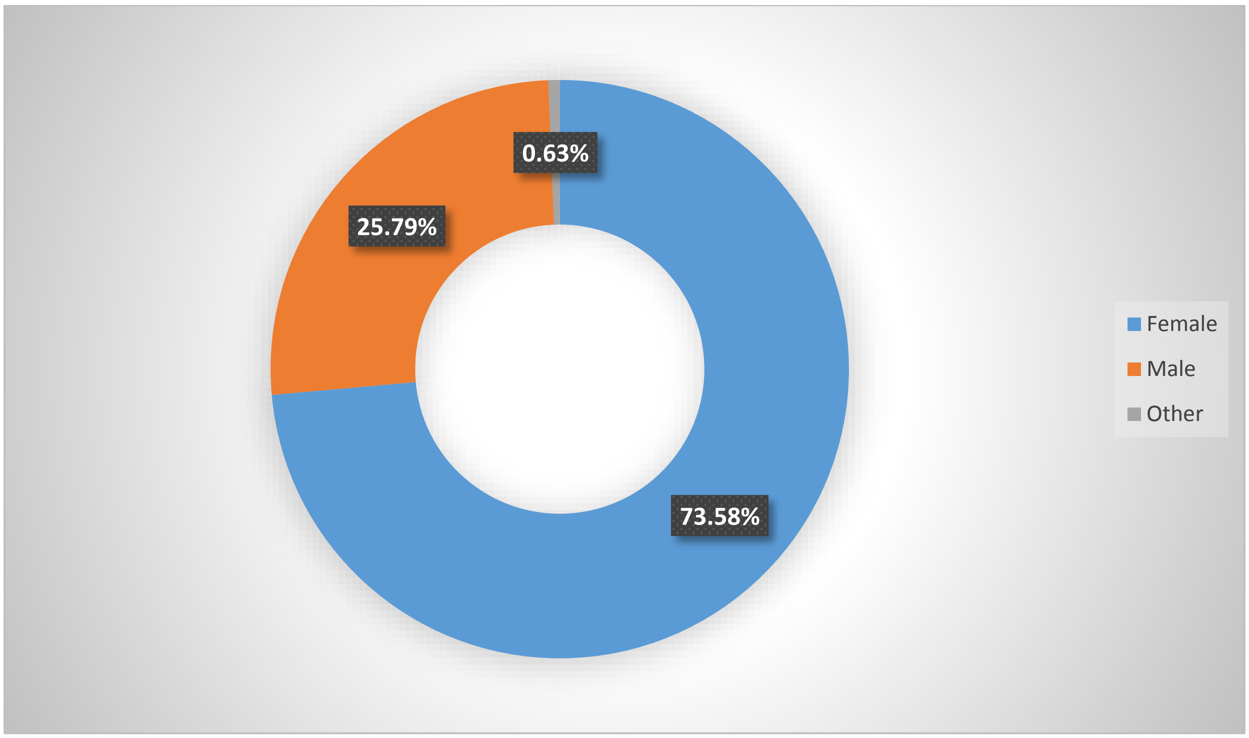
It is a daunting task to come up with substantial quantitative material for analysis. There is hardly a good way (without investing considerable time and resources) to reach every participant in the translation market around the globe. Studies that exist out there do look at parts of the industry, or attempt to query representative samples. An all-encompassing study of the market has not been sufficiently accomplished - and this survey is no exception.

We have set out to find some of the most pressing trends and aspects of the work in translation, and started an elaborate snow ball outreach, that eventually yielded a few hundred replies. We are happy with the attitudes and perspectives the results illustrate, and hope that these results help others working in the industry just as much as they help us understand the requirements of tomorrow's translation businesses.

The Results

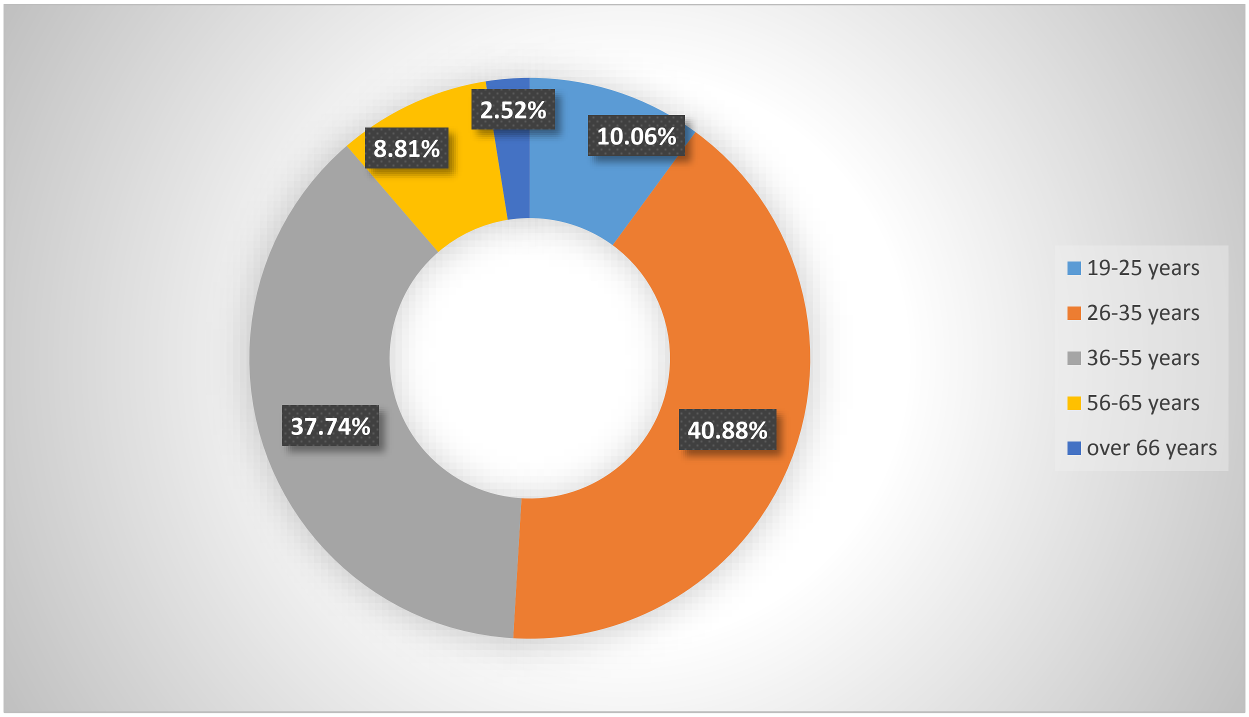
The following is a run through the results with some of our interpretations. First all the questions we asked in the survey and in the end a summary of the free answers and the comments we got from respondents.

Gender Balance



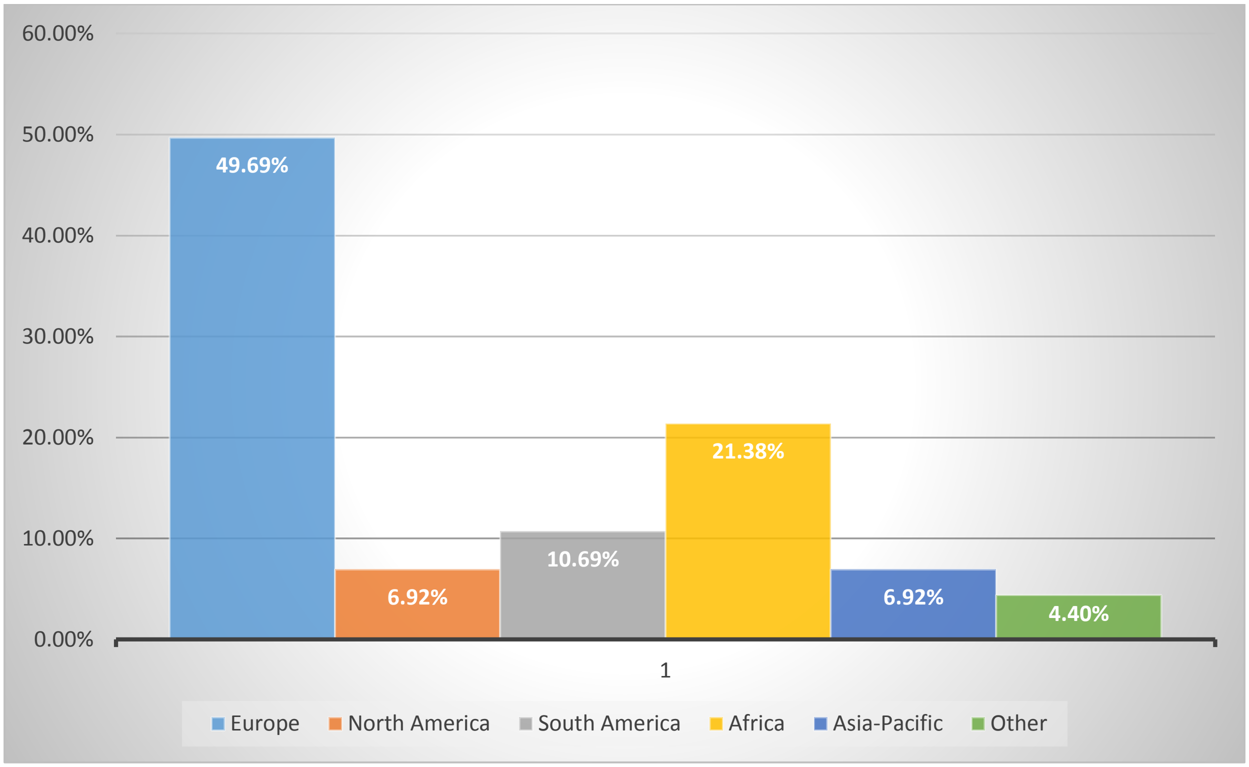
While the snow-ball strategy was certainly not scientifically representative, it was nevertheless startling to see the assumption be sort of confirmed, that a majority of those working in the field are indeed female. However it should be kept in mind that the linguistic profession in general, not just the translation business, boasts a generally higher female to male ratio than some other industries.

Age Distribution



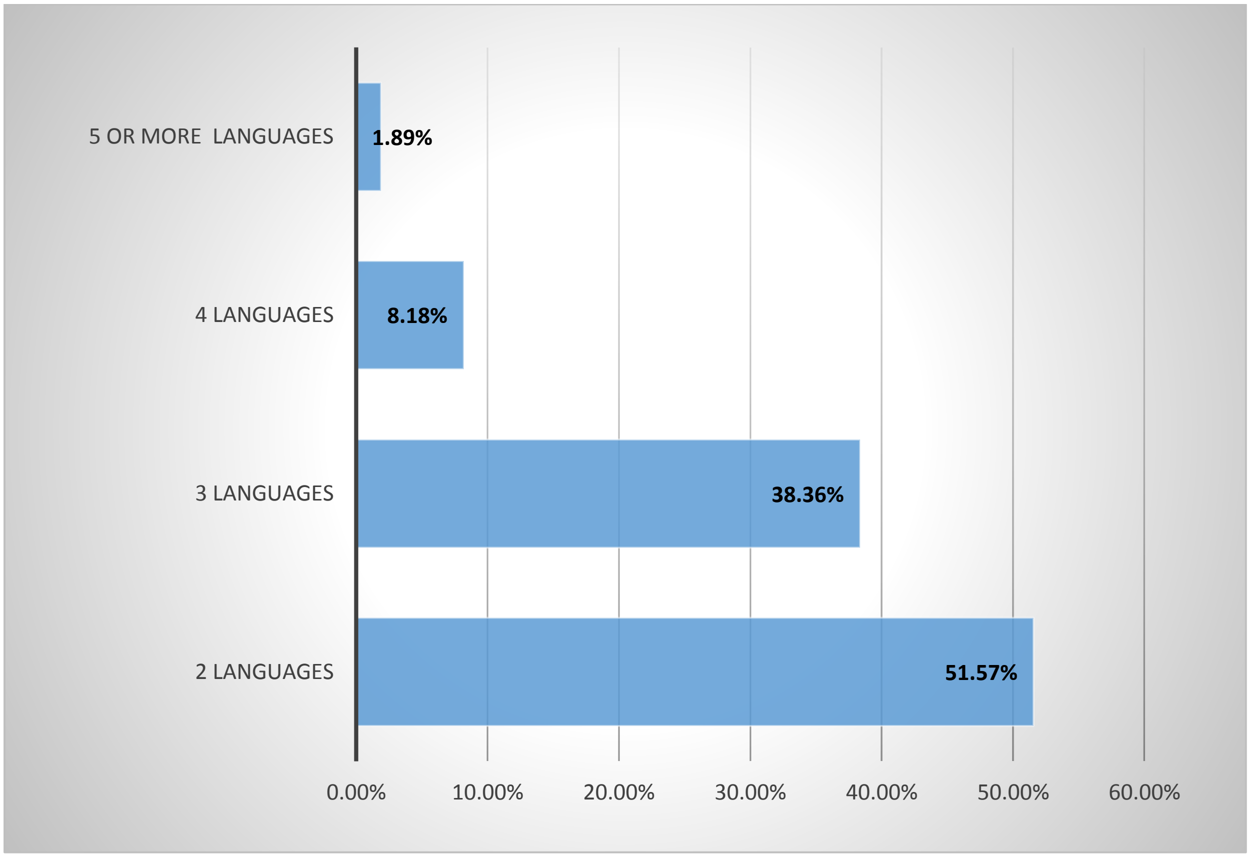
The results here are less clear. While the majority are roughly speaking “young adults”, there are about just as many adults working in the field until the age of 55, after which results dropped off. One reason might however be the fact that we only reached out through online channels, a method that could have excluded many working in the industry not very active on the internet. Just in general, younger people are known to be more active online.

Regional Distribution



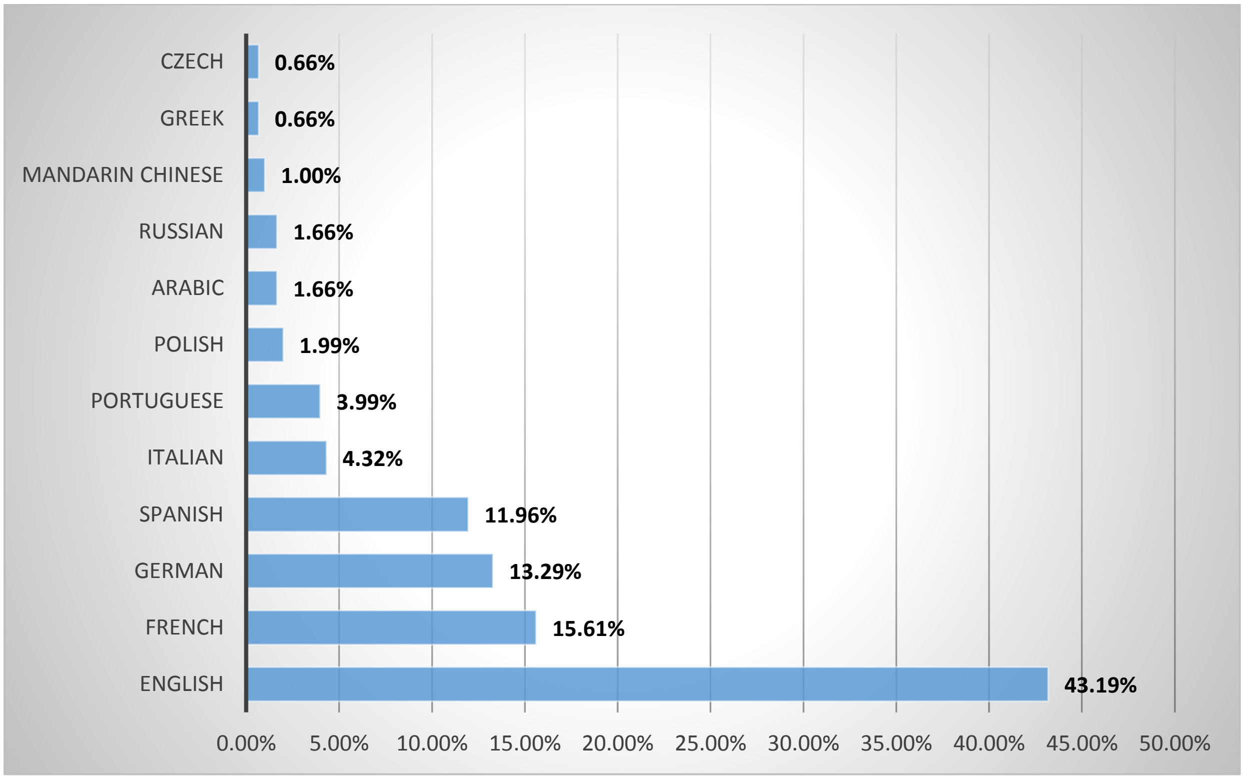
Here we have an effect that is directly a result of our outreach. We are based in Europe and many of the multiplicators that helped spread the survey are also European, that is why the results show almost half of all participants reside in Europe as well. It would be very interesting to see if the results would change for different regions or if translators share similar thoughts all over the world.

Language Fluency: Number of Languages



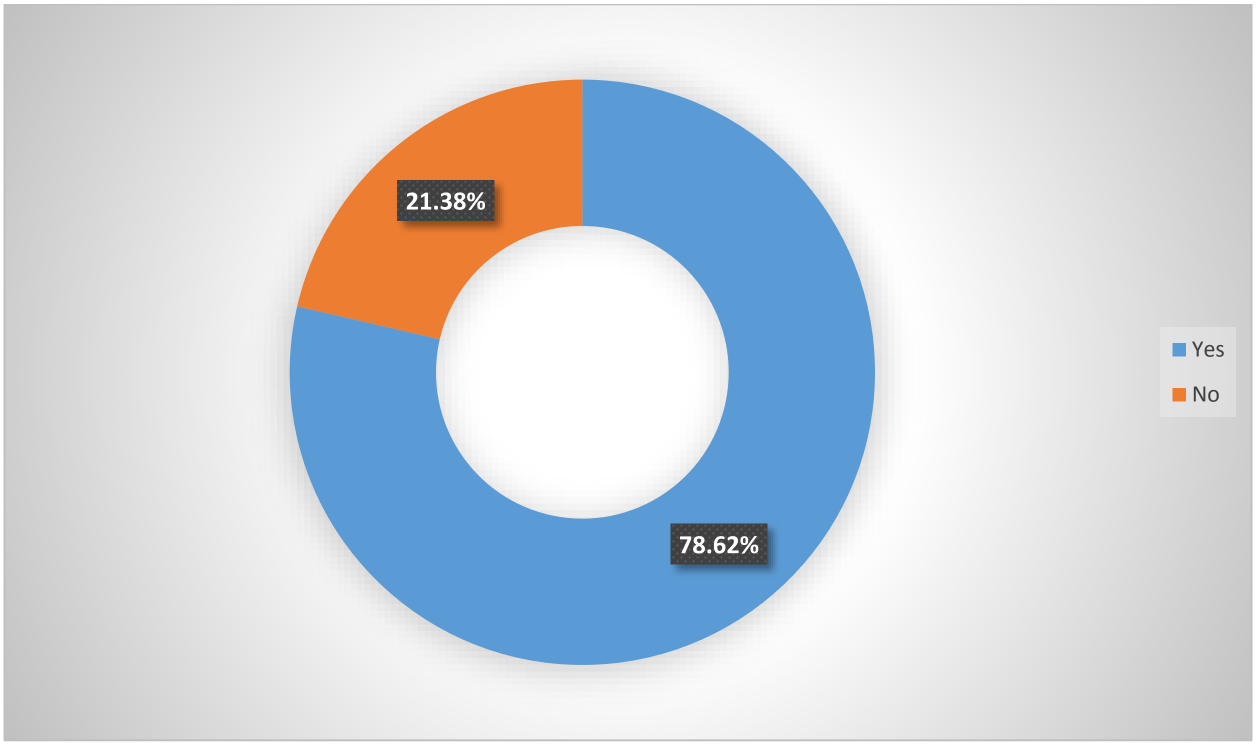
More than half of all respondents indicated that they spoke 2 languages fluently, with a bit less than 40% of respondents speaking even three languages fluently. Since it is very difficult to reach a level close to fluency in more than 3 languages the numbers drop off drastically then. 8.2% of respondents speak 4 languages fluently and 1.8% speak 5 or more.

Language Fluency: Distribution



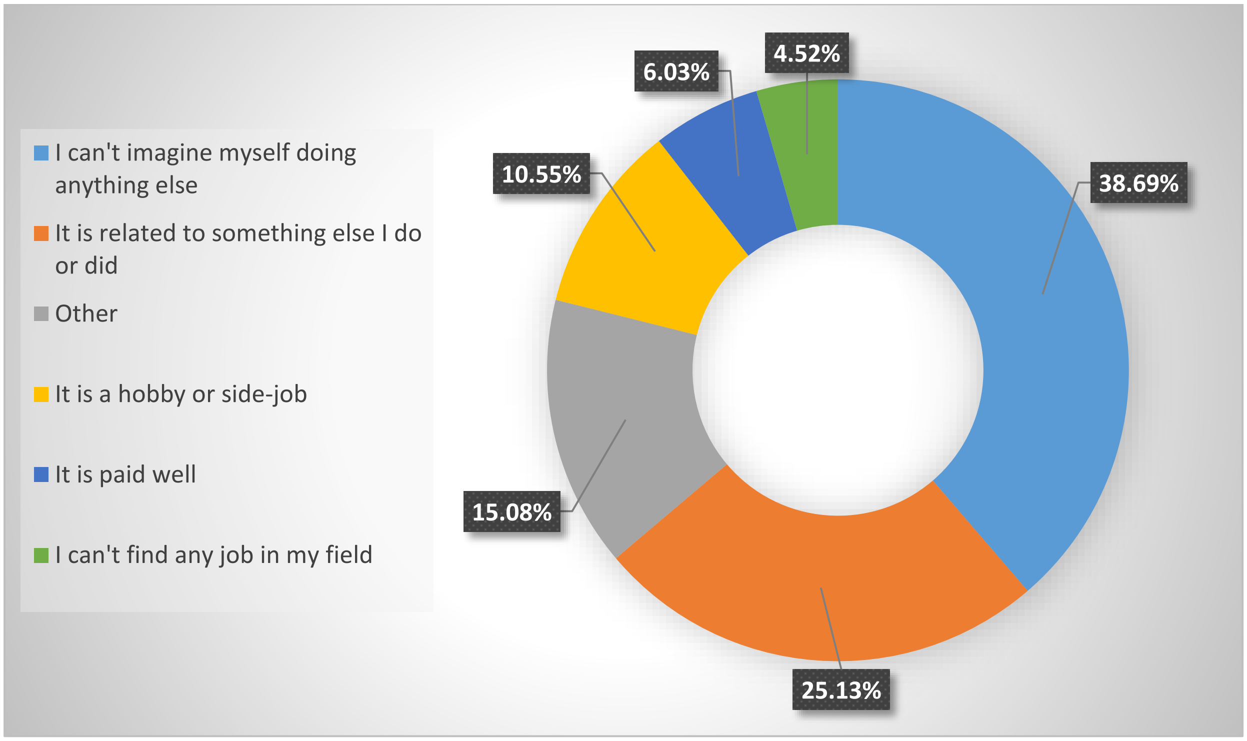
Which language are spoken at native or near native proficiency? English clearly pulled ahead here, with a set of other popular European languages next. This merely cements the regional distribution aspect and shows also how little spread our survey experienced in Central Europe for example.

Academic Background



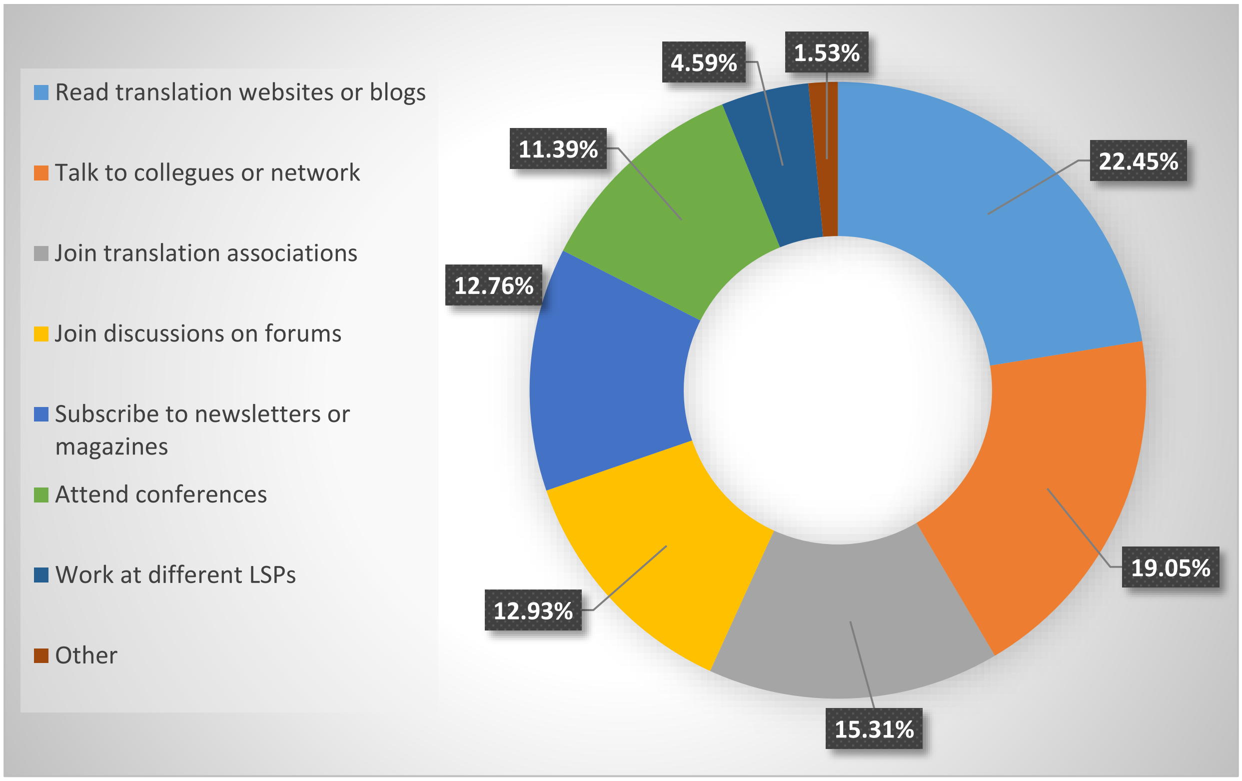
We asked whether respondents had a translation-related academic background, and indeed close to 80 percent indicated that they had. We guess that the rest got into translation due to their expertise in a special field that gives them the necessary know-how needed to translate texts regarding this field, or they changed careers mid way.

Career Motivation



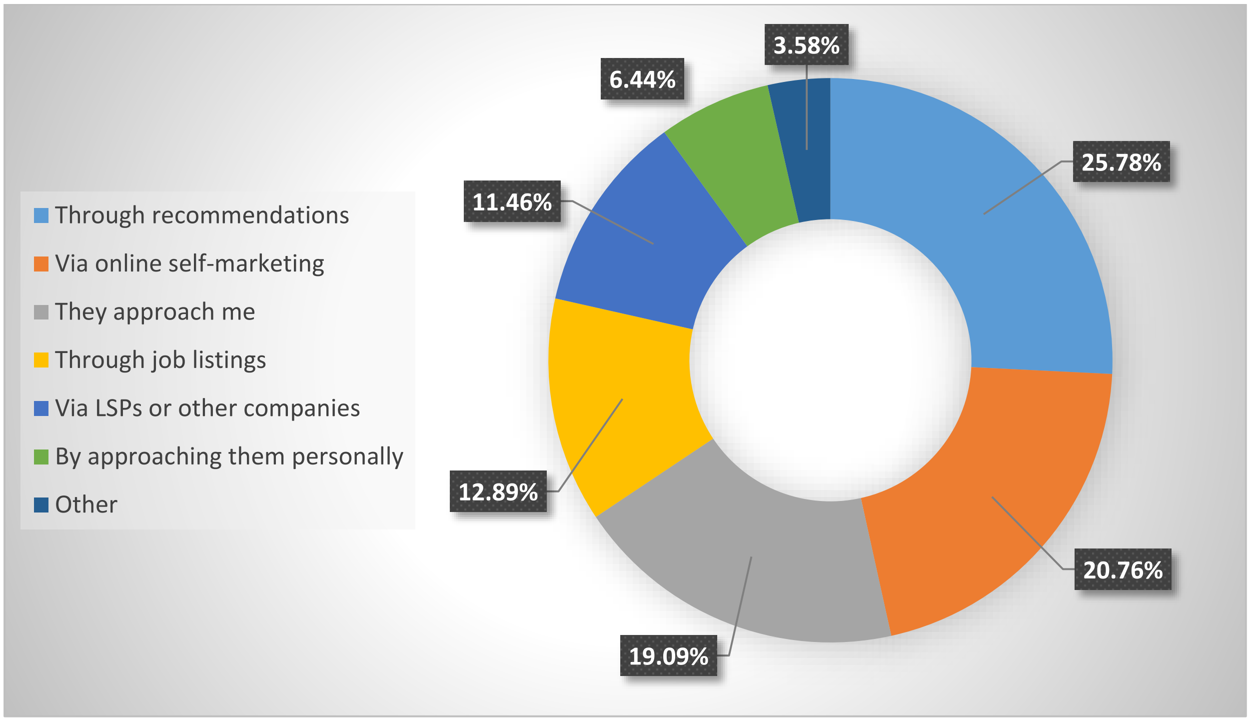
Most respondents are in the translation business out of conviction (close to 40 percent) or because of direct relation in disciplines. Translators who do not translate as their main occupation still make up about ten percent. We assume those could be the people who probably don't hold a degree in translation related studies.

Continuous Education



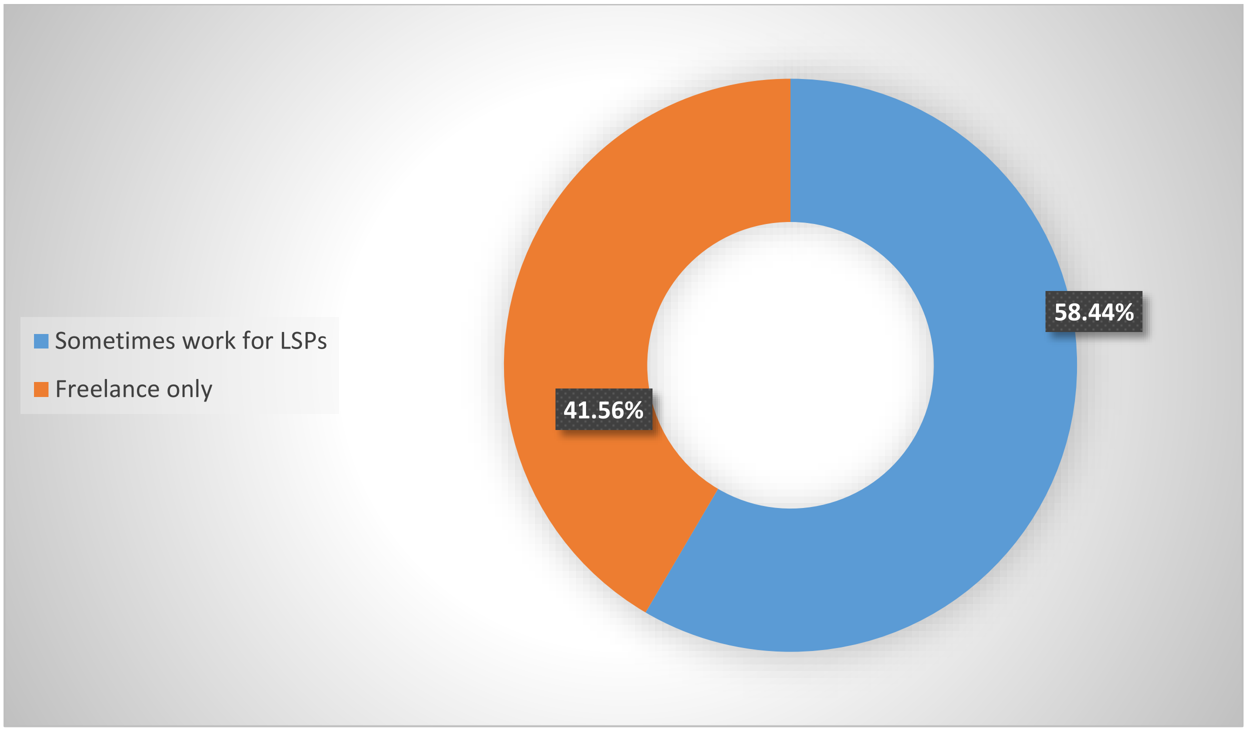
What do respondents do to stay updated? Networking is one of the main activities, aside from being part of associations. Staying informed by reading online is the most prevalent source of continuous education however. Attending conferences is much further behind than we expected. Probably because information is so easily accessible on the Internet and Social Media makes networking easy as well.

Business Development



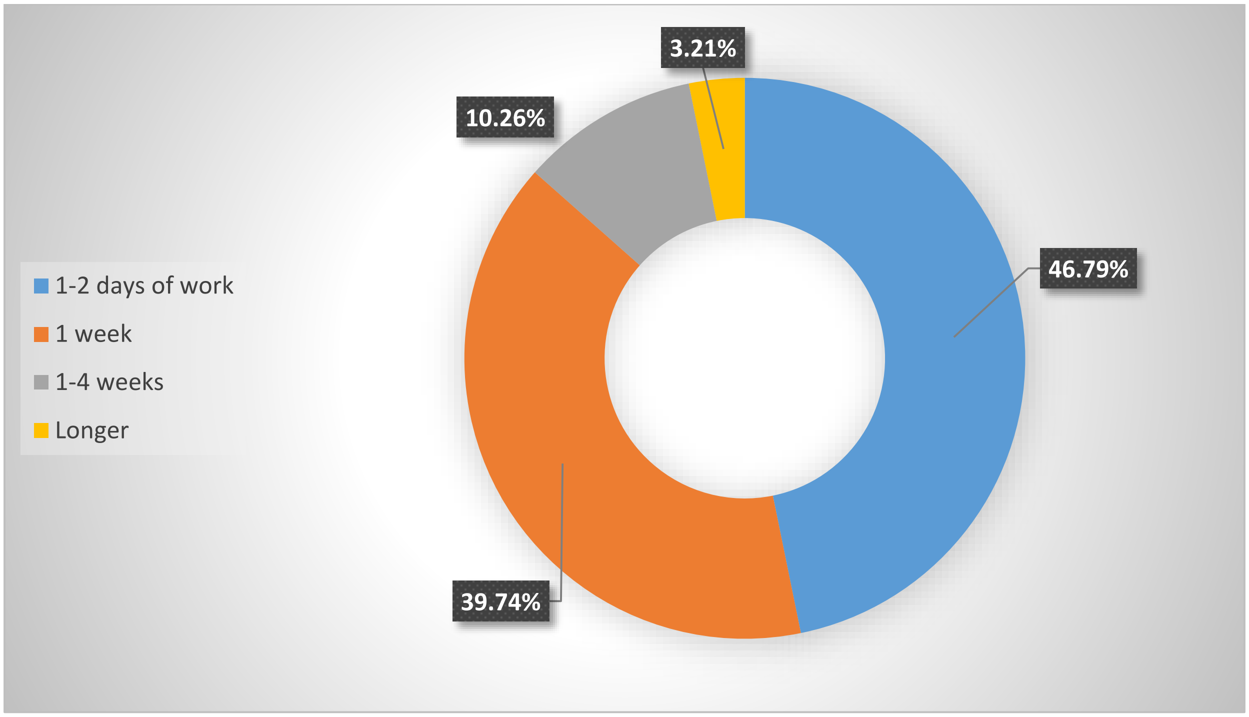
Respondents seem to acquire new clients mainly through recommendations, online self-marketing and by customer requests directly. However here we need to understand that these aspects are interrelated. In a future study we would love to find out what an acquisition funnel of the average freelance translator looks like.

Company Affiliations



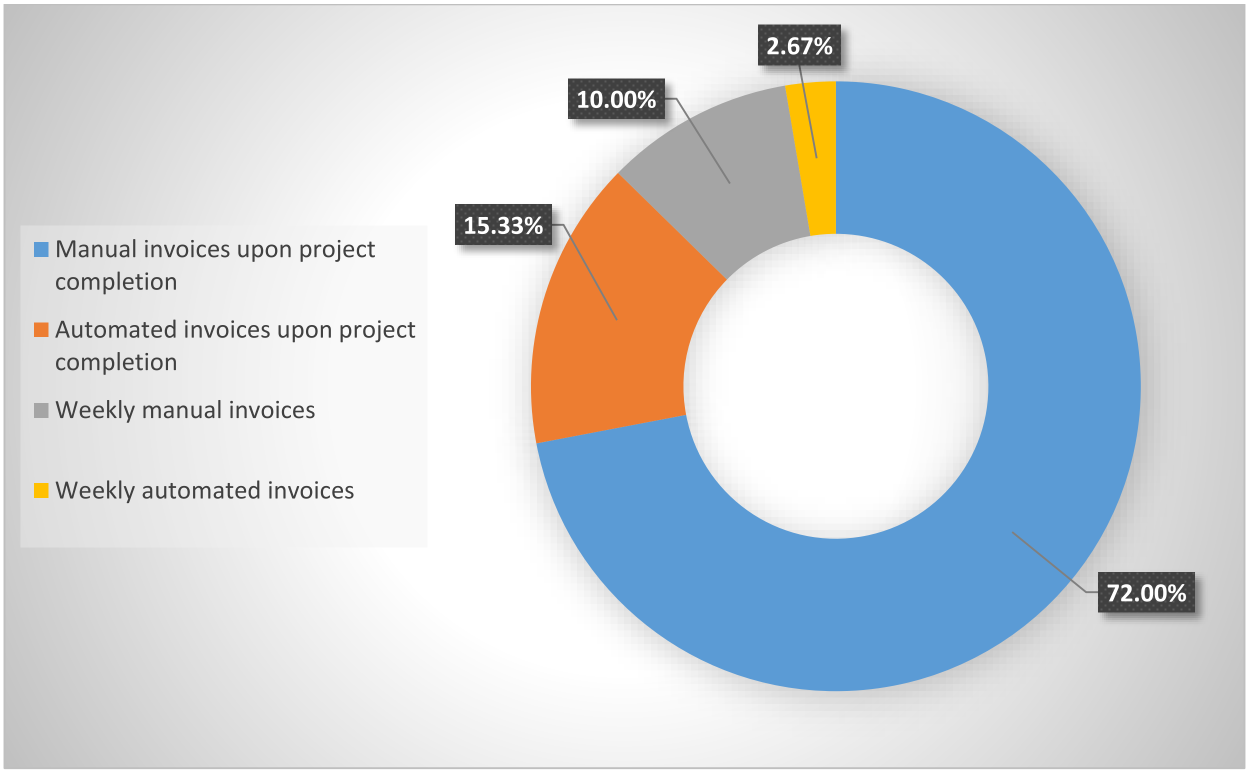
More than half of all respondents work for LSPs or other language companies from time to time. In a future study we need to look at the size of those enterprises and the nature of the relationships. Are those relationships mostly project-based? Or is it an employment for a certain period of time?

Average Project Volume



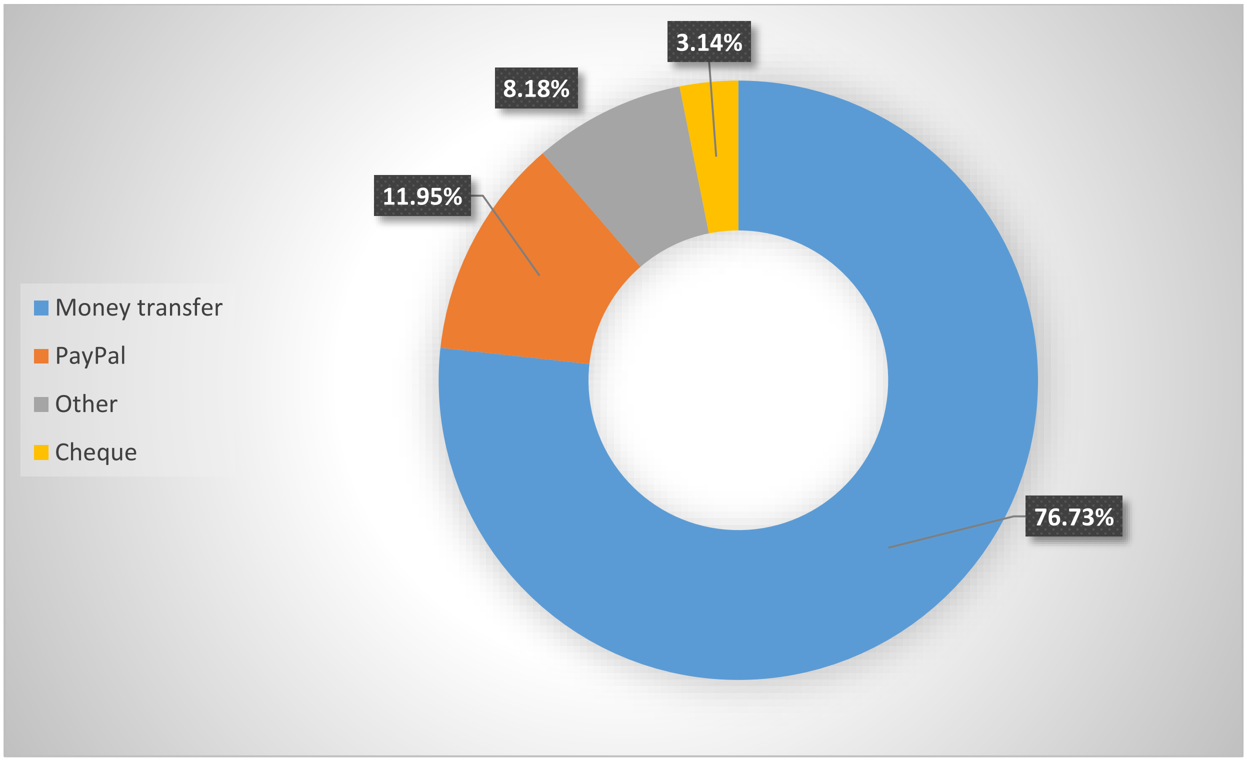
It seems like there is a trend to relatively compact types of jobs that take respondents a few days to a week to complete. This is interesting in a few ways. We need to further understand which kinds of projects are most prevalently performed by freelancers, which ones by LSPs. It seems like smaller projects are more likely to be given to freelancers whereas larger ones are more likely to end up with LSPs.

Billing Patterns



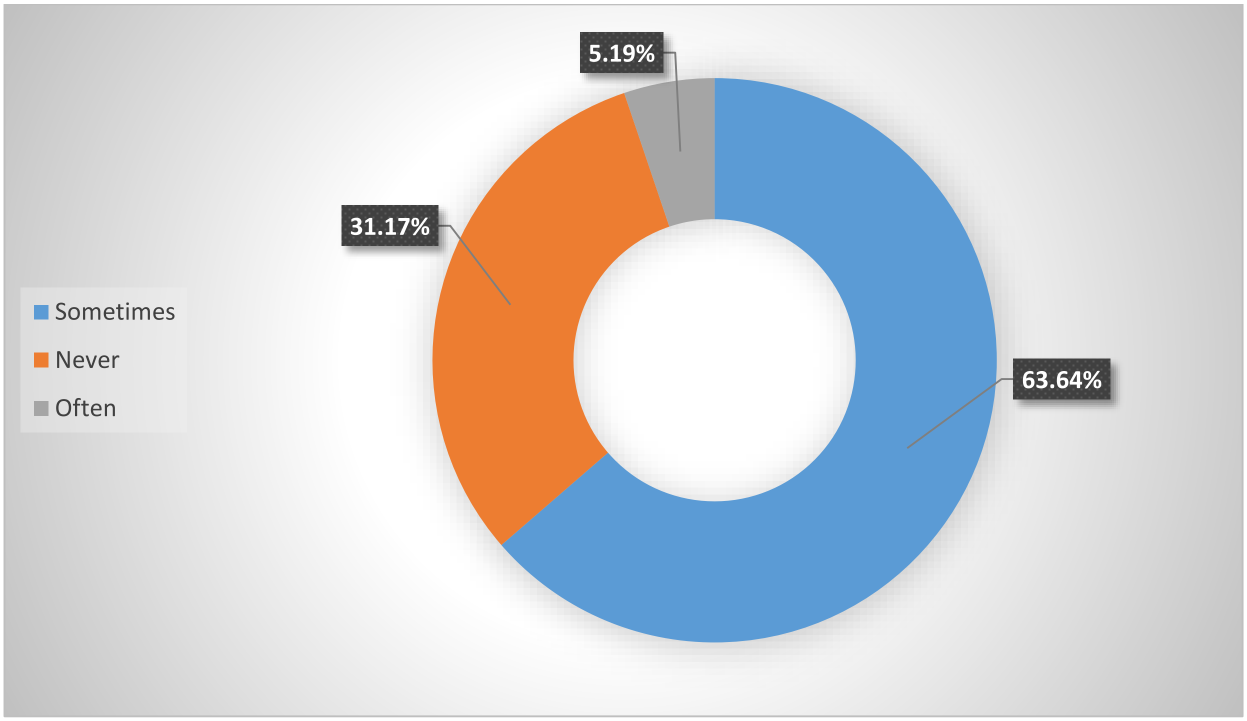
This shows with which frequency and method respondents bill their clients. Due to the spread of automation we wanted to find out if in fact manual invoicing upon project completion is still the standard, and it is, but automation is gaining ground.

Payment Methods



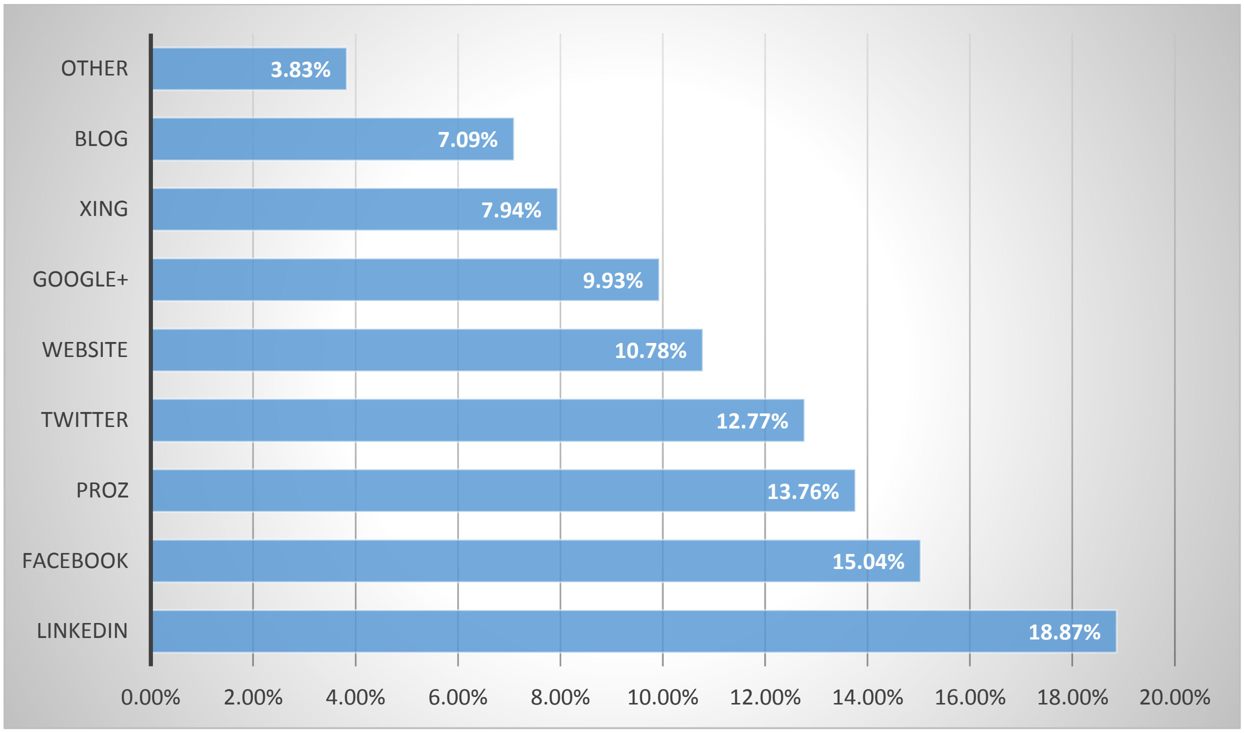
Money or wire transfer is still the most widely used payment method. However, since more than half of our respondents are European, and money transfer is a widely established and convenient/standardized way for payment in this region, this response is not entirely surprising. PayPal comes next showing that a system that works everywhere equally well is highly welcome to freelancers.

Payment and Customer Reliability



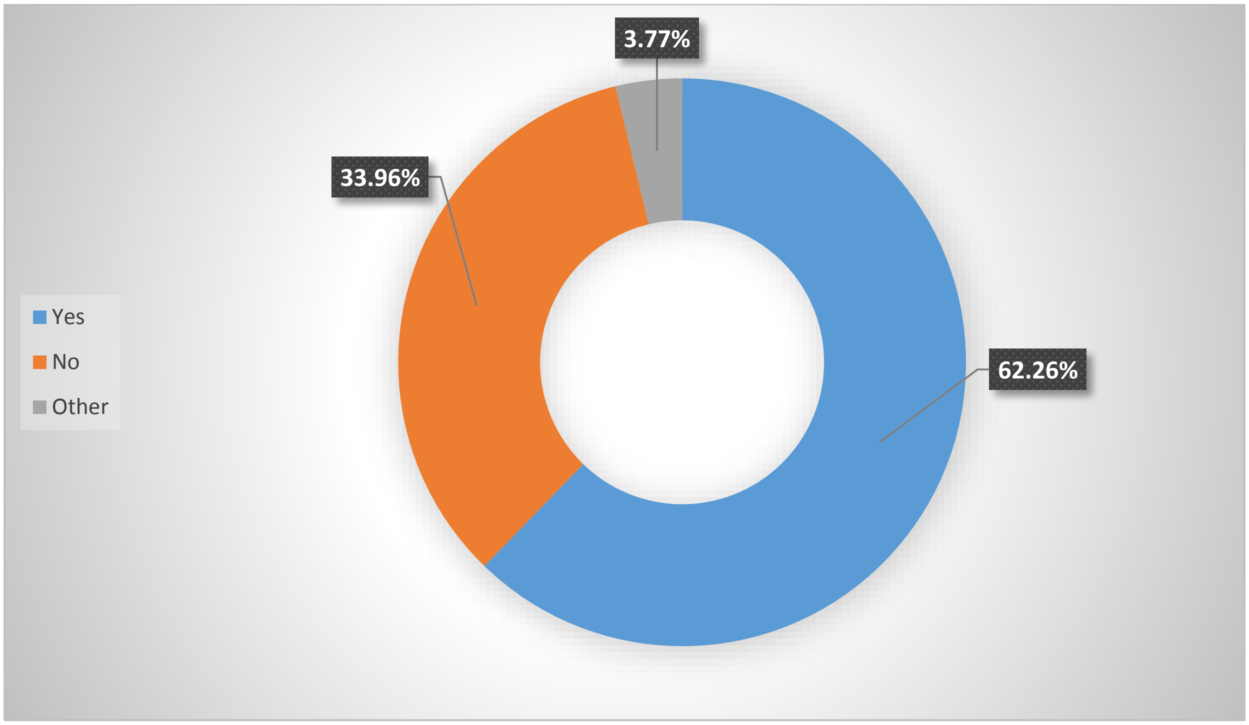
We come to the rather disappointing statistic. Fears of payment troubles are in fact grounded. More than sixty percent of respondents report that they at least sometimes face payment problems with customers. In the future, we do want to explore reasons. Whether these are delayed payments, invoicing problems, technical errors, disputes or cross-border issues could not be further explored at this point.

Self-Marketing: Channels



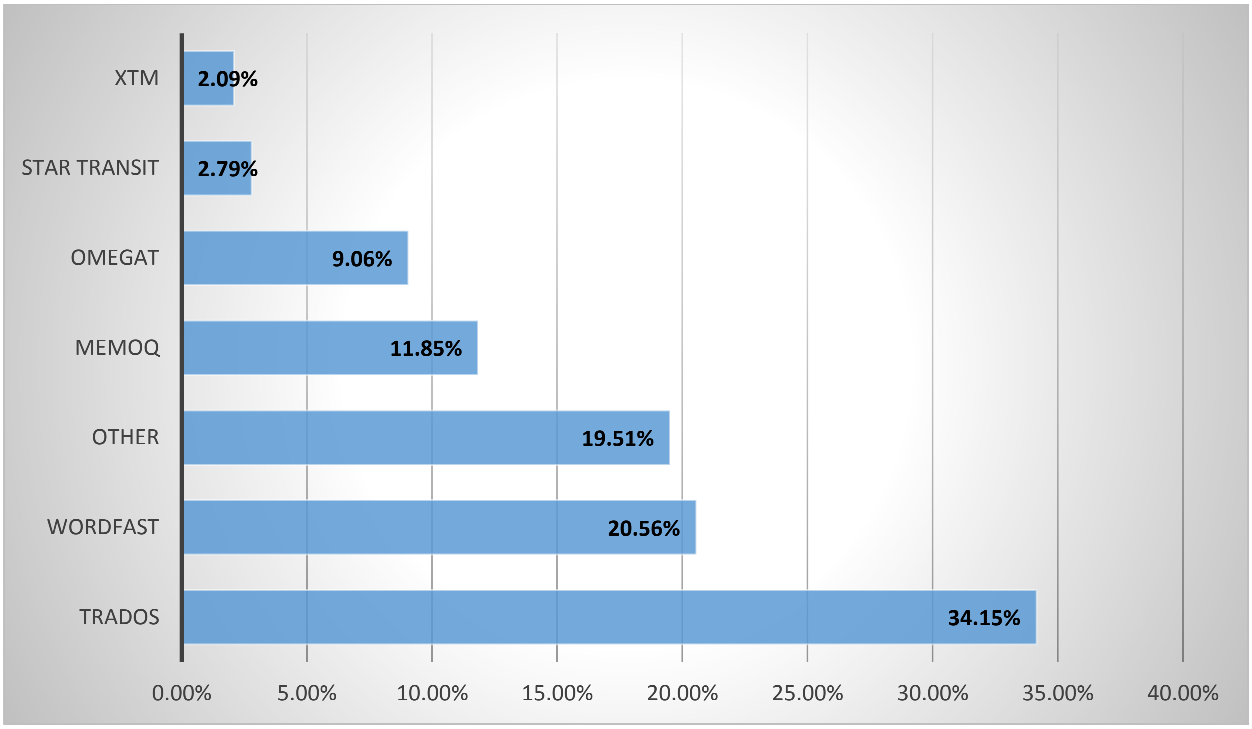
LinkedIn is the most widespread online presence used by translators, followed by Facebook, proz, Twitter and having a website. Interestingly not many translators seem to also write themselves with only about 7% of all respondents having a personal blog.

Usage of CAT Software



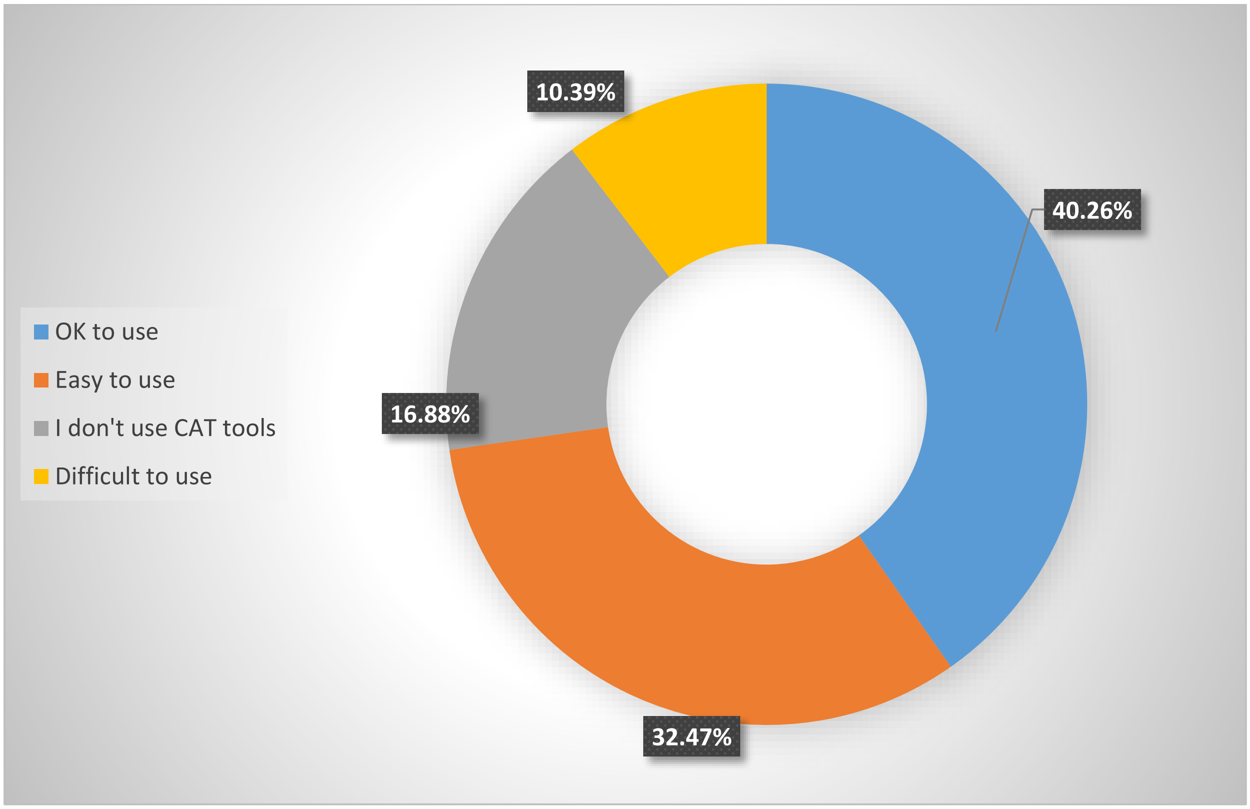
Over 60 percent own and/or use a CAT tool. Interestingly enough, over 30 percent do not. Which makes us wonder what the reasons are those 30 percent prefer not to use CAT tools.

CAT Tool Popularity



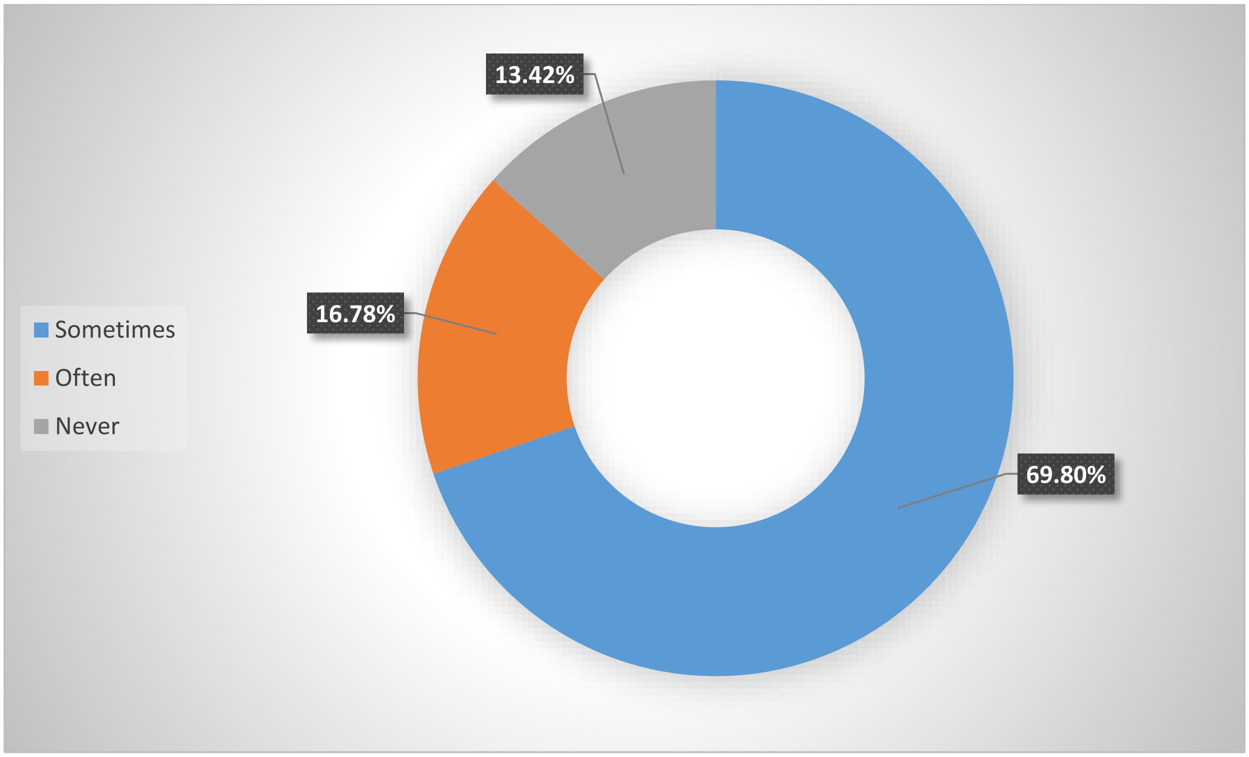
This is a breakdown of which popular CAT tools respondents are using well. It would be interesting to see how these numbers change over time and how the market evolves.

CAT Usability



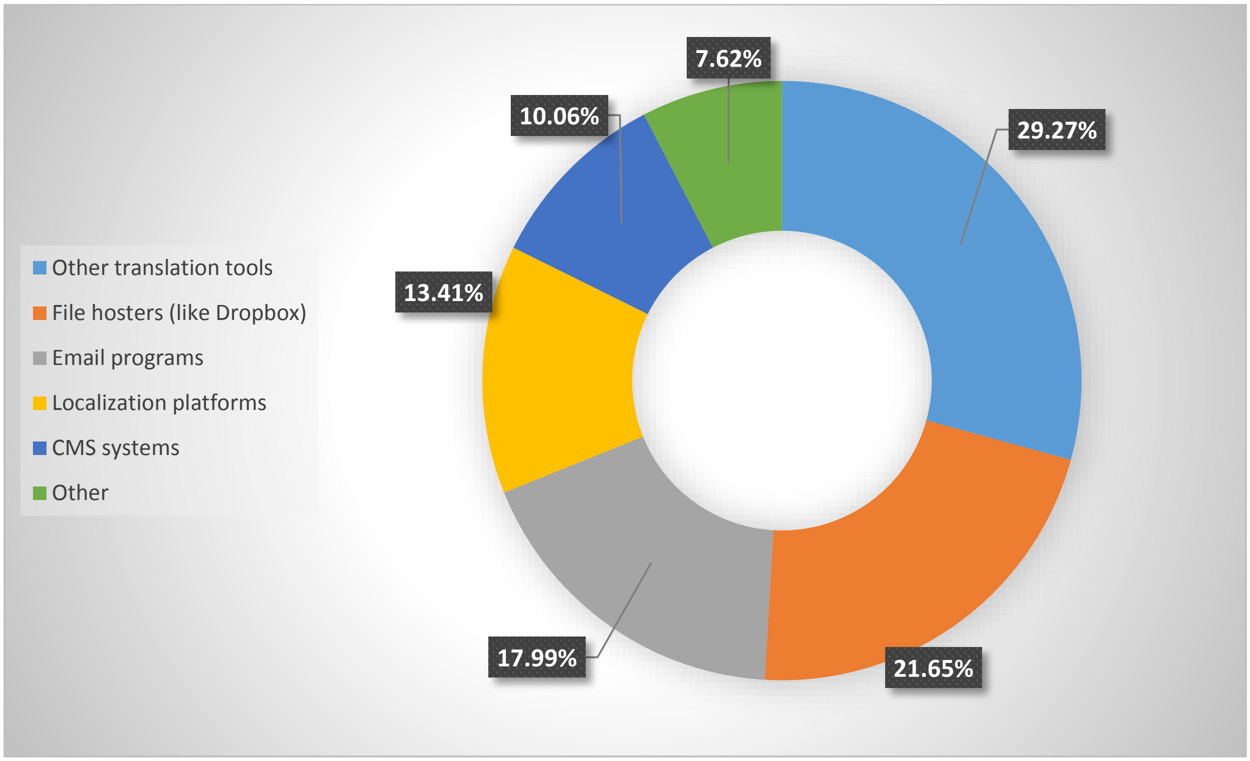
Respondents are not overall satisfied with the usability of common CAT tools. Only little over 30 percent considers them easy to use, forty percent OK to use. Nearly 17 percent don't use CAT tools and we already mentioned that we are wondering why and if usability might be an issue here. About 10 percent even think that CAT tools are difficult to use.

Handling Translation Files and Formats, Imports/Exports



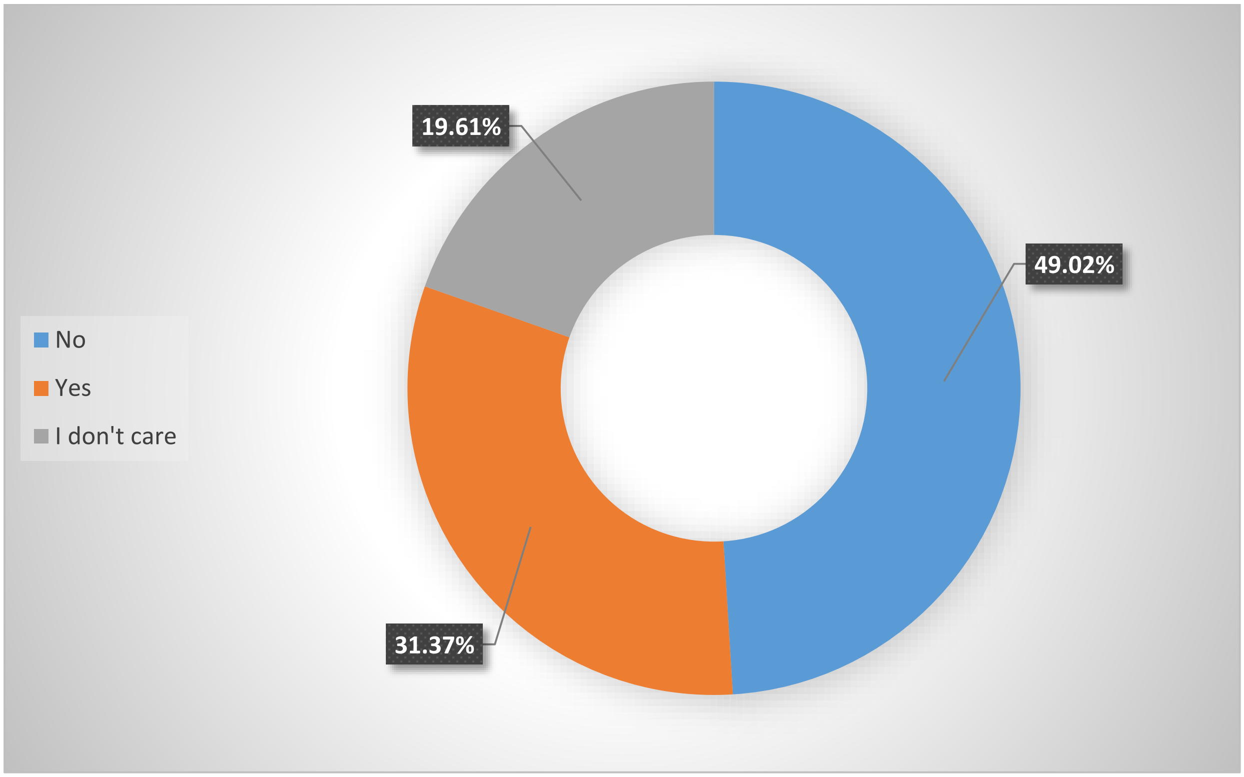
Respondents overwhelmingly stated that they do sometimes run into formatting issues or problems with importing or exporting translation or resource files. Another 17 percent say this occurs often. What does that tell us? Along with mediocre usability, the myriad of files, formats, software versions, and customer requirements or habits, this puts quite a burden on translators and strains the communication between client and translator. There is definitely some room for improvement here!

CAT Tool Integration Wish List



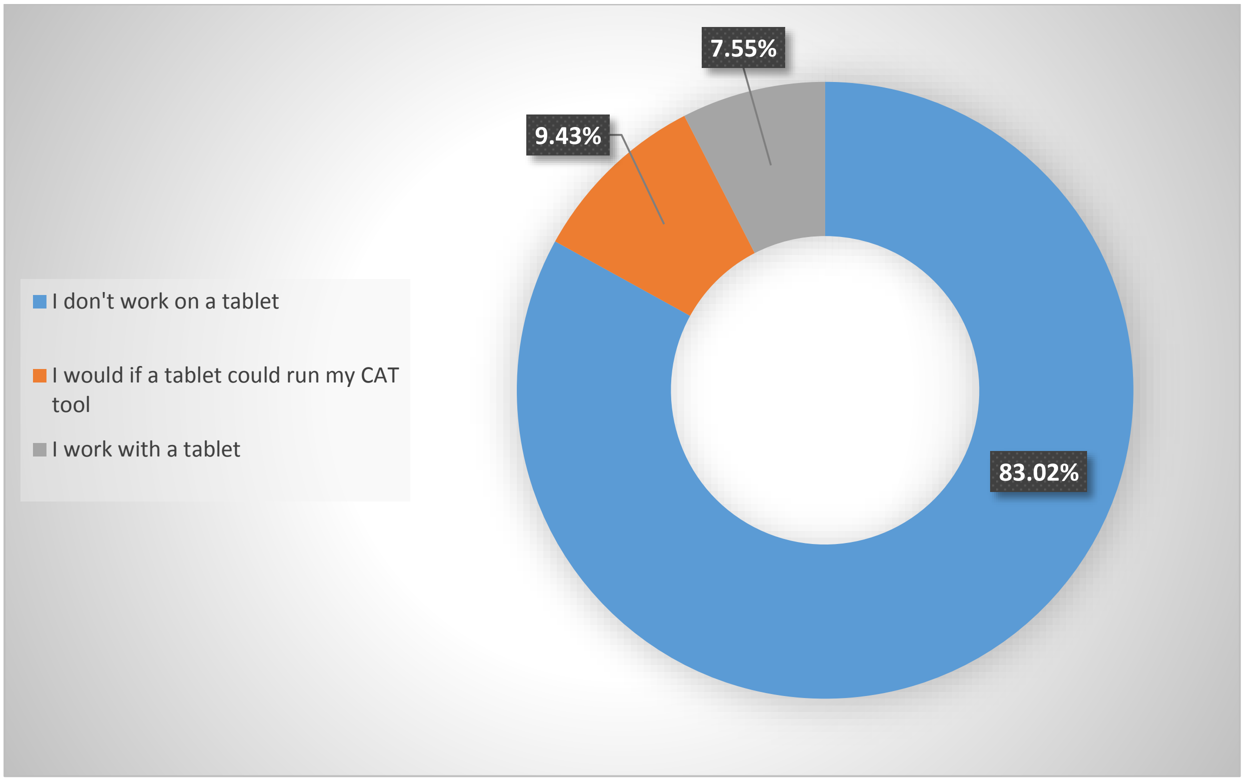
Almost 30 percent would love if CAT tools would be more interoperable and offered integrations with one another. Another 20 percent would like integration with file hosting services, like Dropbox, an almost similar number would like that for Email programs. This adds to our suspicion that file handling is a major drag and needs streamlining.

Backups and Project Security



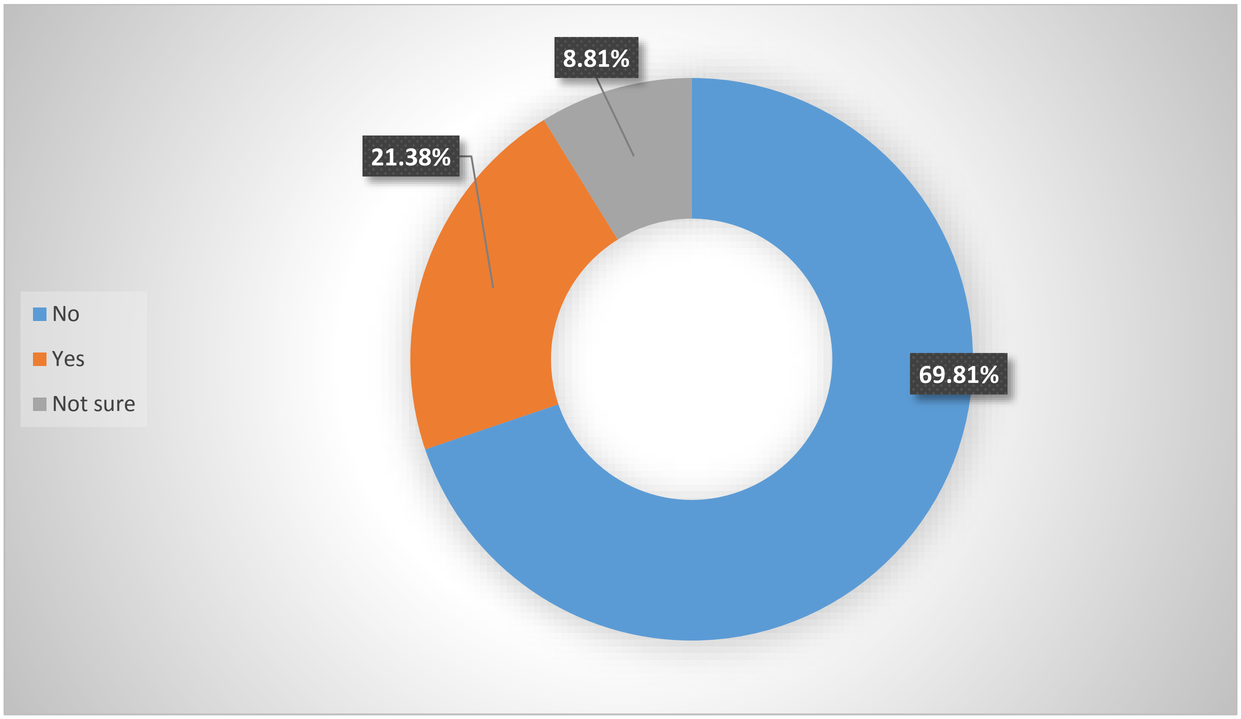
Almost 50 percent indicated that they do not feel burdened by backing up files and ensuring the integrity or security of their project files, but over 30 percent do. This shows that there is awareness out there, but as with other contexts, this issue only rises in priority - unfortunately - once an accident happened.

Tablet Computer use



Let’s see, while over 80 percent say they do not work on a tablet (please note that we did not ask whether they owned one or used one in other contexts), a small number indicated they would if their CAT tool was compatible with the device, and a slightly smaller number is already doing that. We will see how that number changes in the future.

Crowd Translation



Only slightly over 20 percent of respondents have previously participated in a crowd translation effort. The unsure percentage is due to the unclear distinction of what constitutes a crowd translation, and where we enter the sphere of large-scale project collaboration.

Free Answers

Aside from the above questions, we left it open to respondents to pass on some additional information. What follows are some of the more recurring ideas from that open part of the survey.

"What would you ideal translation environment look like?"

- In terms of features, many respondents asked for advanced editing functions, inclusion of glossaries, dictionaries, grammar checks, correct quotes, RTL support and other extras.
- In more general terms, most responses indicated the wish for really easy to use and intuitive user interfaces, customizeable workspaces and good online capability
- An all-in-one solution that includes project management, accounting and invoicing as well as the CAT functionality itself seems desirable especially among those who have very active translation offices or high project volume.
- Capability was quite an issue, many cited interoperability, integrations and FTP support as ideal.
- Lastly, affordability was mentioned quite a number of times. We have run smaller surveys in the past that also indicated, especially among newcomers, that affordable tools are still not universally possible.
- Collaboration is also a huge aspect these days. Multi user support and online collaboration, even just calendar sharing and reminders, are something future tools need to offer.

Additional remarks or interesting Quotes that were added to the survey

- Translation tools should also learn
- It is important to consider privacy and data protection
- LSPs are very attached to the CAT tools they have chosen, even if they're awful, so compatibility among tools is one of the major issues that need to be addressed
- Cloud tools need to consider unreliable internet access in some areas
- "Why I am a freelance translator: I love the freedom and creativity"
- I think it is a fantastic industry, provided you are self-disciplined and hard working
- Working with bad OCR is a huge problem that a CAT tool alone cannot solve
- There is no big international organization that gathers all the translators. Do we need more super-associations?

Conclusion

The survey emphasizes both some general assumptions of the industry's state of affairs, and it also highlights some of the more prevalent desires common among translators. It is not surprising that there is an underlying dissatisfaction with certain market dynamics, and with the tools available to deal with them. As online translation gains in importance, not only will many translators have to diversify or professionalize in certain niche areas (there is plenty of good literature and advocacy work done in that area), they will also have to compete with increasingly capable machine translation and big data text analysis that will require different skill sets and new approaches in their implementation - which could even open up entirely new areas of specialization.

In the short to medium term, it is however important that we work together in mitigating some of the problematic areas (payment, data security, internet connectivity, affordability, market rates) and help each other harness the positive effects of the web to empower the individual translator (lower transaction costs, easy access to information, online collaboration, economies of scale, mobility). There is plenty of room to innovate, not just on a software level, but also when it comes to organization among translators, communication between translators and agencies of different markets and regions, standardization, continuous education and public policy or advocacy work, even PR (the industry needs to communicate its services better to compete with machine translation, many customers just are not sufficiently aware).

A more extensive stock-taking of the global community should at some point be undertaken, quite possibly in cooperation with associations, institutes and other (non-specific) industry associations, to get a more representative picture. The true challenge lies with extensively mapping the global translators community, its diversity and economic composition.

We hope this survey helps you understand the industry somewhat better, we look forward to reactions, while considering it as a "first draft", a survey to be repeated in the near future, with more questions, bigger outreach and higher level of detail.

Imprint

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