

AN INTRODUCTION TO THE LANGUAGE INDUSTRY

Latitude Prime

*Professional & Accurate Language
Solutions for the Global Marketplace*

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In today's increasingly connected global marketplace, the ability to communicate seamlessly in multiple foreign languages is critical for businesses and governments alike. Whether you want to do business in a foreign country, market your products or services internationally, or communicate with Limited English Proficient (LEP) communities in your local area, language services are indispensable.

The main services to fall under the category of "Language Services" (NAICS 541930) include written translation, interpretation (on-site, over-the-phone, or video-remote), localization, multilingual desktop publishing (DTP), audio/video transcription, foreign language voiceover, subtitles, language training, cultural consulting, and more.

The English word "translation" derives from the Latin word *translatio*, which literally means "carrying across" or "bringing across," as in a text from one language into another. The history of translation itself traces back thousands of years, with some of the most notable early translations including the Sumerian poem, *Gilgamesh*, translated into multiple Asian languages, the translation of early Buddhist scriptures from the Pali language into Classical Chinese, and the first translation of the Old Testament of the Bible from Hebrew into Greek in the 3rd century BCE.

One of the greatest historical finds for linguists came in the form of the Rosetta Stone in 1799 by Napoleon's army, which consisted of a seemingly innocuous royal decree from the Egyptian king Ptolemy V, which was written in ancient Egyptian hieroglyphics, the Demotic script, and Ancient Greek. This side-by-side comparison of three versions of a single text, however, allowed linguists to piece together ancient Egyptian hieroglyphics and significantly expand their understanding of the Egyptian language and history.

Since then, over the course of many centuries, the translation profession and language services industry have changed and evolved exponentially. Long gone are the days of handwritten translations copied out by scribes in cloistered monasteries, instead replaced by highly skilled linguistic and subject matter experts working from a home computer and researching terms and concepts on the Internet.

Nevertheless, while large corporations such as Google and Microsoft have invested billions in machine translation technology, human translators remain the key resource in the language industry, and will likely remain so for the foreseeable future.

Today, the language services industry is one of the fastest growing industries internationally, accounting for roughly \$46.52 billion in 2018 and estimated to reach more than \$56 billion by 2021, according to the Common Sense Advisory, the leading market research organization for the language industry. For first-time or infrequent buyers of language services, taking that first step into such unfamiliar and uncharted territory can be daunting. What is the difference between “translation” and “localization”? How do I know which language service provider I should use? These are just a couple of the many questions that novices in the industry may have, and the purpose of this publication is to help in understanding what this industry is all about.



**LANGUAGE
INDUSTRY FACTS**

MARKET SIZE

The language industry currently accounts for approximately \$46.52 billion in the global market, expected to reach \$56 billion by 2021.

LANGUAGES OF THE INTERNET

The English language currently accounts for more than 1 billion Internet users, followed by Chinese (805 million), Spanish (338 million), and Arabic (220 million).

**LANGUAGES
USED IN THE U.S.**

Roughly 350 different languages are spoken in the U.S. Next to English, the most widely spoken languages are Spanish (41 million), Chinese (3.4 million), and Tagalog (1.7 million).

**THE LANGUAGE OF
BUSINESS**

While English is the most important language of the academic and business world, other key languages include Chinese, Spanish, German, Portuguese, and Arabic.

LANGUAGES OF THE WORLD

According to Ethnologue, there are roughly 7,100 languages spoken in the world today, as of 2018. However, many extremely low-density languages are on the verge of extinction.

EMERGING INDUSTRIES

The top emerging industries in need of language services include travel/tourism websites, e-commerce, the financial sector, gaming industry, and the social media industry.

TRANSLATION

Translation refers to the conversion of written text from one language (the “source language” or SL) into another language (the “target language” or TL). Additionally, according to the Globalization and Localization Association (GALA), “the purpose of translation is to convey the original tone and intent of a message, taking into account cultural and regional differences between source and target languages.” Therefore, translation involves more than the direct translation of words between two languages, but must also take into account the socio-cultural nuances of the target language and target audience, such as education level, industry-specific jargon, and regional linguistic variations.

Translation is often viewed as a combination of linguistic science and art, seeking to find the appropriate and subtle balance between “faithfulness” to the original source text and “transparency,” namely rendering the translated text in such a way that it appears to a native speaker of the target language that the text was originally written in that language, in terms of style, tone, syntax, grammar, and vocabulary.

Other translated-related services often include editing/proofreading, document review (triage), and summary translations/gisting.

Finally, a “certified translation” refers to the inclusion of a sworn declaration or affidavit from the translator or translation provider affirming that they are competent in both the source and target languages, and the translation has been completed to the best of their knowledge and ability. Translators (and/or the language service provider) include their name, signature and contact information to support the certification. This certification allows the reviewing party to be sure that the information provided in the translated document is accurate and is often required by educational institutes, government offices and for certain legal matters and proceedings, such as immigration.

INTERPRETATION

Unlike translation, interpretation involves the conversion of one spoken language into another spoken language. In other words, according to the International Standards Organization (ISO), interpretation involves “rendering a spoken or signed message into another spoken or signed language, preserving the register and meaning of the source language content.” Professional interpretation is often considered a more demanding field than written translation, as it requires the interpreter to be able to interpret speech in near real-time, without the benefit of research time typically afforded to translators.

The three primary modes of interpretation are consecutive interpretation, simultaneous interpretation, and sight translation. Consecutive interpretation is most commonly used in one-on-one or small group settings, and involves one person speaking, followed by a brief pause to allow the interpreter to relay the message in the language(s) involved to the other party.



Simultaneous interpretation (also often referred to as “conference interpretation”) involves communicating between foreign languages in near real-time, without the pauses involved in consecutive interpretation. It is typically used for large conferences, meetings, or speeches/presentations, and is a much more complex and strenuous process than consecutive interpretation. The interpreters usually sit in an isolated booth, listen to the speaker through a headset, and speak nearly simultaneously into a microphone, which is then wirelessly transmitted to headsets/receivers worn by the audience members.

Finally, sight translation involves the reading of a text by an interpreter from the source language into the target language in a manner in which the content of the document can be easily understood by the audience.

LOCALIZATION

Localization (also known as “L10N”) is the process of modifying a product or content to adapt to the particular cultural and linguistic needs and preferences of users in a different geographical region or locale, modifying the source content to function as though it was originally created for the specific market in which it appears. While translation is a key component of the localization process, the following elements must also be considered in the localization process:

- Adapting graphics and images to specific target markets;
- Adapting of symbols, icons, and other extra-linguistic semiotic content;
- Modifying content to suit the tastes and consumption habits of the target audience;
- Adapting design and layout to properly display translated text (e.g. fonts, right-to-left languages or languages with different character sets, etc.);
- Conversion of units to local requirements (such as currencies, measurements, numerals);
- Using the proper local formats for dates, addresses, and phone numbers;
- Addressing and complying with local regulations and legal requirements;

Localization projects can range from simple websites and marketing materials to complex software programs, apps, and multimedia presentations. Clients utilize localization services when looking to expand their products or services to international markets that seamlessly adapt to the local language, culture, and regulations.

The localization process is also more complex than a standard translation project. The basic process involves collecting detailed information on the client's requirements during the "pre-project" or analysis phase, often through the completion of a detailed checklist. Once the client's specifications and statement of work have been determined, the files to be localized -- which can include .xlsx, .csv, .xml, .strings, .html, .xliff, .properties, .json, and many more file types -- are sent to a localization engineer to extract the content to be translated. A team of translators who are specialized in localization then translate the content into the specified target language(s).

Other steps in the process include modifying or changing graphics, fonts, color schemes, packaging, SEO keywords, keyboard shortcuts, etc. to conform to the target market. Once the translation and localization process has been completed, extensive post-localization Quality Assurance (QA) is done to verify that all content has been translated/localized, check for broken links in websites, and oftentimes market testing as well.

MULTILINGUAL DESKTOP PUBLISHING

Another important service in the language industry is multilingual desktop publishing (DTP). If you have marketing materials, such as brochures, pamphlets, fliers, or booklets that have been created in a graphic design program, you can replace the source language text with the translated content in your original source files while maintaining the integrity of the original format/layout, including fonts, styles, colors, etc. Some of the more common graphic design programs are Adobe InDesign, Illustrator, Framemaker, Pagemaker, Quark Xpress, Microsoft Publisher, and many more.

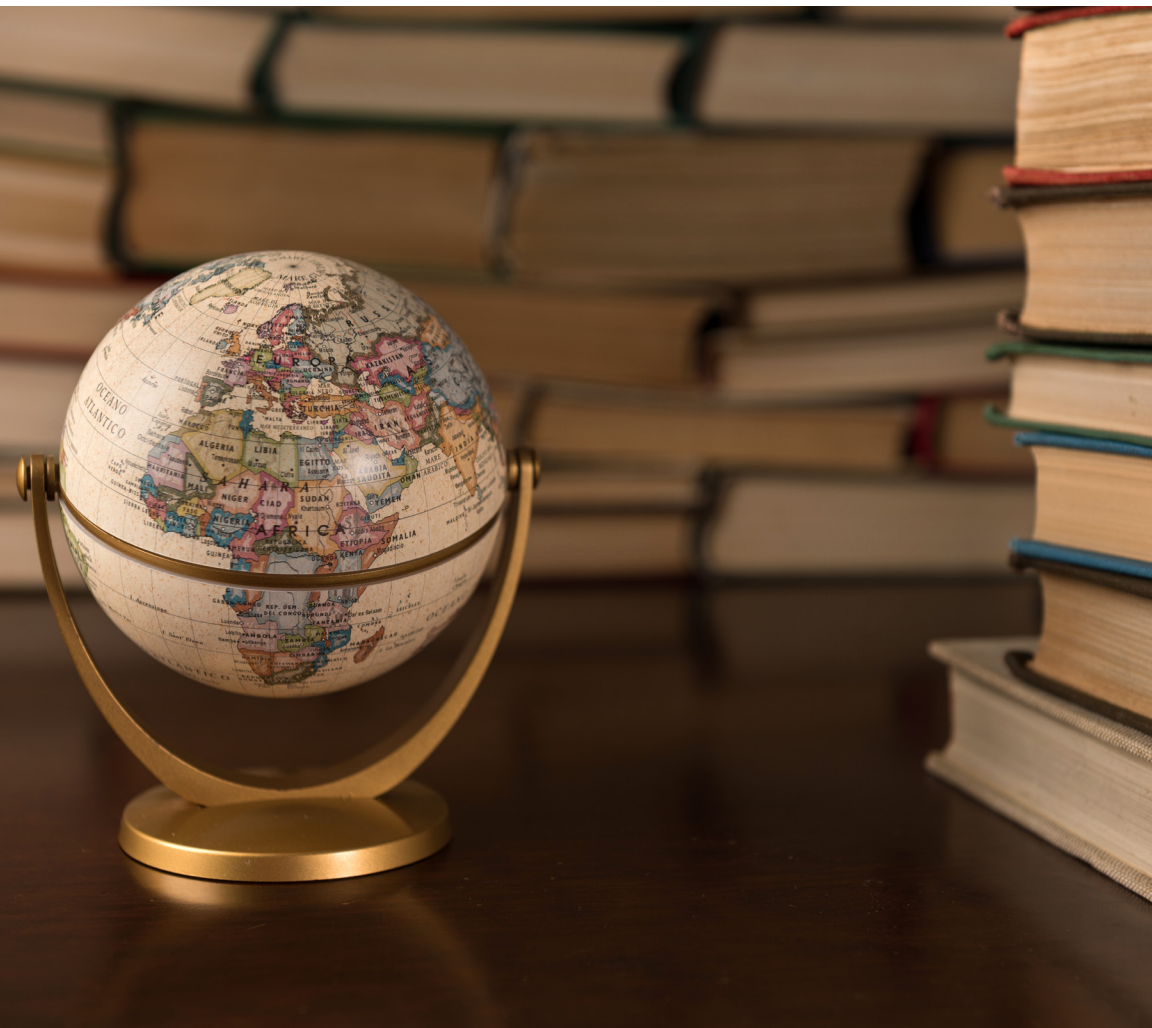
For many government clients (or government contractors), Section 508 Compliance is also required for documents that will be posted on the Internet so that they meet the requirements of the Rehabilitation Act of 1973, Americans with Disabilities Act (ADA), and subsequent accessibility guidelines. These guidelines mandate that all digital content be optimized for special software, screen readers, and other types of technology utilized by individuals with disabilities.

The types of content that must comply with Section 508 requirements include website content, emails, software, gaming systems, apps, and PDF versions of printed assets. PDFs also typically require 508 remediation, as they are not accessible by screen readers.

TRANSCREATION AND BEYOND - OTHER LANGUAGE SERVICES

Document translation, interpretation, and localization have traditionally represented the most frequently used language services, there are a variety of other ancillary services that are growing in popularity as the global digital marketplace becomes more complex, diverse, and competitive. Other related language services include the following:

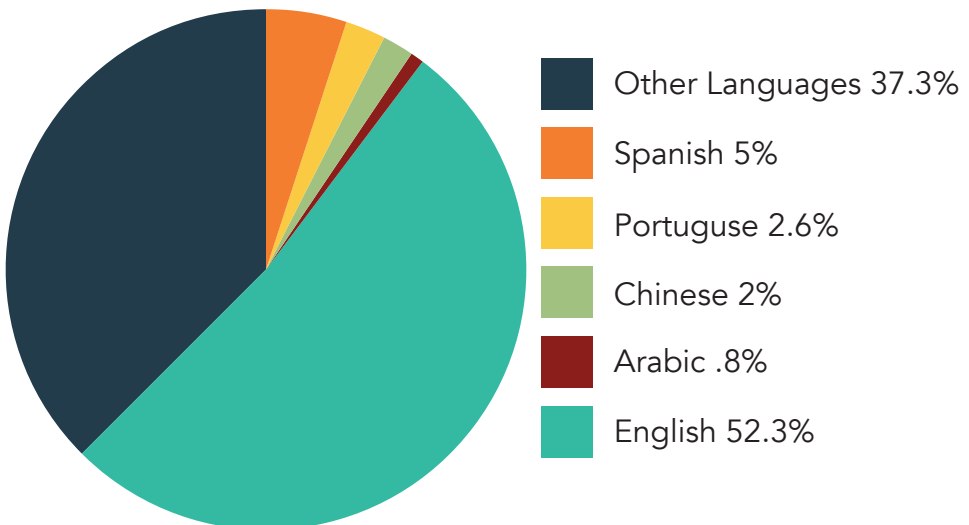
- Transcreation
- Language Training & Instruction
- Bilingual Staffing
- Cultural Consulting
- Internationalization
- English Adaptation
- Multilingual Social Media & Keyword Research



WHY YOUR ORGANIZATION NEEDS LANGUAGE SERVICES

In today's rapidly changing global marketplace, where economic borders are gradually being broken down and being replaced by free trade agreements, it has become more and more important to be able to communicate effectively with speakers of other languages. Whether a company is marketing its products or services to international markets or to local Limited English Proficient (LEP) communities in the United States, conducting international business negotiations, or working with foreign partners and suppliers, being able to provide content and information in your target audience's native language is vital for growth and success.

Although approximately 1.5 billion people speak some level of English (roughly 20% of the world's population) the majority of those are not native speakers and their skill level varies greatly. On the Internet, English now accounts for only about 50% of web content, with Russian, German, Japanese, Spanish, French, Chinese, and Portuguese content rapidly increasing. Additionally, a study from the Common Sense Advisory found that 75% of customers prefer to buy products in their native language.



To achieve optimal results in expanding into an international market, this would include localization a company’s websites in multiple foreign languages (depending international market research), providing translation support for customer support queries, hiring foreign language call center support representatives, and much more.

Even for businesses with a local focus that are not planning an overseas expansion in the near future, the rapidly changing demographics and increase in non-English speaking and LEP communities across the United States necessitates foreign language support (translation, interpretation, and localization) both to grow business opportunities and even to simply remain competitive.

According to the Center for Immigration Studies, approximately 1 in 5 U.S. residents (nearly 67 million) spoke a language other than English as of 2017, which includes native-born, legal immigrants, and illegal immigrants. That number has more than doubled since 1990. Additionally, in 85 cities and Census Designated Places (CDP), a majority of residents speak a language other than English at home. These numbers are expected to continue rising exponentially over the next decade.

Rank	Language Spoken at Home	Total	Bilingual Share (%)	LEP Share (%)
	Total	64,716,000	60%	40%
1	Spanish	40,046,000	59%	41%
2	Chinese (all dialects)	3,334,000	44.3%	55.7%
3	Tagalog	1,737,000	67.6%	32.4%
4	Vietnamese	1,468,000	41.1%	58.9%
5	French	1,266,000	79.9%	20.1%
6	Arabic	1,157,000	62.8%	37.2%
7	Korean	1,109,000	46.8%	53.2%
8	German	933,000	85.1%	14.9%
9	Russian	905,000	56%	44%
10	French Creole	863,000	58.8%	41.2%

Source: Migration Policy Institute (MPI) tabulation of data from the U.S. Census Bureau 2015 American Community Survey (ACS). <https://www.migrationpolicy.org/article/language-diversity-and-english-proficiency-united-states>

The most commonly spoken foreign languages in the United States (with more than 1 million speakers each) include Spanish, Chinese, Tagalog, Vietnamese, Arabic, French, and Korean. The states with the largest percentage of their populations speaking a foreign language at home in 2017 were California (44 percent); Texas (36 percent); New Mexico (33 percent); New Jersey (32 percent); New York and Nevada (both 31 percent); Florida (30 percent); Arizona (27 percent); Hawaii (26 percent); and Massachusetts (24 percent).

In addition, states with the largest percentage increase of foreign language speakers between 1980 and 2017 were Nevada (increase of 1,080 percent); Georgia (increase of percent); North Carolina (increase of 771 percent); Virginia (increase of 488 percent); Tennessee (increase of 441 percent); Arkansas (increase of 428 percent); Washington (increase of 410 percent); Florida (increase of 384 percent); South Carolina (increase of 379 percent); Utah (increase of 368 percent); and Oregon (increase of 356 percent).

What this data shows is that not only has there been a significant increase in foreign language speakers in large metropolitan areas that have long had large immigrant communities, but there has also been a significant increase in foreign language speakers in many areas that traditionally have not had large populations of non-English or LEP speakers.



HOW TO CHOOSE A LANGUAGE SERVICE PROVIDER (LSP)

Once you've decided that your business or organization does, in fact, need language services, whether translation, interpretation, localization, or all three, you will need to select a language service provider (LSP).

When it comes to choosing the right LSP, there are a number of important factors to consider:

1) What kind of services (and languages) do they provide?

Not all LSPs are the same. Some may offer only document translation in a few common languages, while others may offer a dizzying array of services in hundreds of languages and subject areas.

If you only need Spanish translation for a few documents, a smaller more focused LSP may work for you. However, few people like to manage multiple service providers if it can be avoided. Therefore, if you expect your needs to grow along with your business and marketing strategies, and you envision needing a full range of comprehensive and integrated language solutions, you should find an LSP that a wider variety of service offerings.

2) Do they have experience in your field?

As mentioned above, not all language service providers offer the same languages and services. The same holds true for subject areas and technical fields. For example, if you are in the medical/healthcare field, you want to make sure that your prospective provider(s) has sufficient experience handling medical-related translation, interpretation, and localization services.

Industry-specific terminology/jargon, style, and subject matter expertise (SME) vary greatly from industry to industry. While an LSP may provide outstanding legal translations, it does not mean they have the expert linguists to translate medical device instructions or documentation related to a clinical trial.

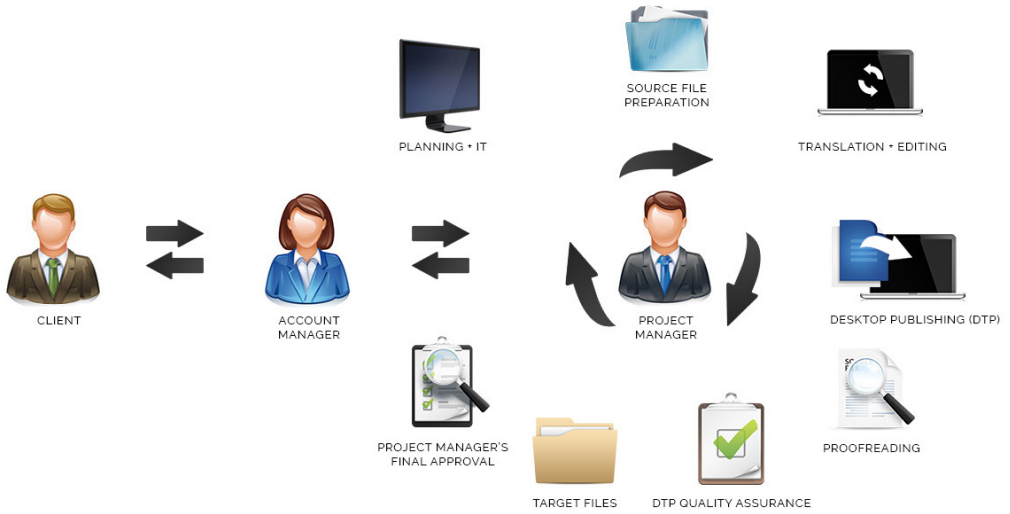
3) What is their project management process?

One of the key advantages in working with an LSP versus an independent translator is that an LSP provides project management support (among other things). However, the project management processes and support can vary greatly among LSPs. Make sure to find out whether your prospective language provider will provide you with a single point of contact for all of your projects, or if you will be working with a different project manager for every request.

Having a single, dedicated project manager can be very helpful in ensuring a smooth and effective relationship with your chosen service provider, as they will come to fully understand your processes and expectations over time, ensuring that every project will meet your standards so you won't have to go back multiple times to request something be fixed to your liking. You should also make sure that they keep detailed written records of your preferences, any style guides or glossaries, and will have a dedicated team of translators working on all of your projects to ensure consistency.

Lastly, you will need to ask about their workflow and whether their processes will dovetail seamlessly with your own workflow. For example, will projects be managed via email a web-based portal, or File Transfer Protocol (FTP), and what role (if any) will you, the client, play in this process (points of review/input/feedback, responding to queries, technology, etc.)





4) How do they ensure quality with their services?

As language is a human function (thus translation and interpretation as well), it is prone to error. While it may seem cliché, it is true that language is as much an art as it is a science. Any given phrase can be translated in a multitude of correct ways, depending on the origin and personal preferences of the translator, target audience considerations (such as dialect or education level), and many more factors. There are also translations that may be “technically” correct, but don’t faithfully capture the tone or style of the source content, are written in such a way that they read like a translation and not as if it was originally written in the target language, or don’t appropriately use industry-specific terminology/jargon or idiomatic expressions.

Given the complexity and subjectivity of language, it is difficult to know if the translation you have received is both technically accurate and idiomatically appropriate unless you happen to be a native speaker of the target language. Therefore, we must rely on the experience and expertise of a reputable language service provider.

However, there are a number of items you can verify with a service provider prior to engaging their services to determine that they have the systems and processes in place to successfully manage your language project:

- ❖ They should be affiliated with a recognized organization, such as the American Translators Association (ATA) or Association of Language Companies (ALC);
- ❖ They should have a well-documented Quality Management System (QMS) and Quality Control Process (QCP) that they are willing to share upon request;
- ❖ They should follow internationally-recognized standards for quality in the language services industry, such as ISO and/or ASTM International;
- ❖ They should have a comprehensive and thorough recruitment, vetting, and on-going auditing process for their translators and interpreters;
- ❖ They should be able to provide references for projects/clients of a similar size and scope to your requirements.

The above questions represent just a few of the key points you should be discussing with any prospective language provider(s). Like any good partnership, your relationship with your LSP will only get better and more efficient with time (and possibly less expensive!), as long as you have chosen the right provider. If you haven't taken the time to thoroughly vet your prospective language provider(s) and ask the right questions, though, you may be in for a bumpy road, with late deliveries, cost overruns, and customer service headaches.



Below is a list of some of the most Frequently Asked Questions (FAQ) we receive at Latitude Prime (LP) and our responses:

What are “certified” or “sworn” translations?

Certified translations are typically required by educational institutes, government offices and for certain legal matters and proceedings, such as immigration.

A “certified translation” includes a sworn declaration or affidavit from the translator or translation provider affirming that they are competent in both the source and target languages, and the translation has been completed to the best of their knowledge and ability.

Translators (and/or the language service provider) include their name, signature and contact information to support the certification, which will be provided on official LP letterhead. This certification allows the reviewing party to be sure that the information provided in the translated document is accurate.

How much do language services cost?

The cost for language services can vary greatly, depending on the type of service (translation, interpretation, or localization), language pair and direction, turnaround time, and the type of content.

Costs for written translation are typically charged on a per word basis. For documents that are provided in their original source format (e.g. MS Word, Adobe InDesign, PowerPoint, etc.) and that contain a significant amount of repetitive text, leveraged or tiered pricing may be available through the use of Computer-Assisted Translation/Translation Memory (CAT/ TM) tools.

Costs for on-site/in-person interpretation are usually assessed on an hourly or daily basis, while costs for Over-the-Phone Interpretation (OPI) are generally charged per minute.

And finally, costs for services such as multilingual desktop publishing (DTP) or formatting, localization engineering, document review, and on-site linguist staffing are normally charged on an hourly basis.

Why can't I use Google Translate for my translation?

If you just need to get the gist of personal email communications written in a foreign language or a foreign language web page, Google Translate is a viable option. However, while Google Translate, guided by its innovative neural machine translation engine, has made strides in improving its translated output over the past several years, it is still not a very reliable tool, particularly for professional-level translation services where linguistic nuance and context is so critical, and Machine Translation (MT) solutions are still a long way from being able to solve this conundrum. Therefore, if accuracy and appropriate linguistic nuance is important for your language project, you should always choose to work with human translators.

What is Computer-Assisted Translation (CAT)?

Over the past decade, Computer-Assisted Translation (CAT) and Translation Memory (TM) technology have taken the language services industry by storm. A CAT tool is a software program/linguistic database that stores source content and captures a human translator's corresponding translated content as they work. The software saves these "segments" of text to be re-used in the future, improving the efficiency and consistency of human translators.

The CAT tool displays each segment of text and a corresponding previous translation for re-use, if there is at least a partial match. The translator has the option to re-use the previously translated segment, revise the translation, or enter an entirely new translation.

These text segments -- comprised of sentences, phrases, or sentence-like units -- are broken down by the CAT tool into “No Match” (or “new” text), “Fuzzy Match” (a partial match between the source text and a previous translated segment), and “Repetitions” or “100% Match,” wherein the translation of an entire segment can be re-used completely, without modification.

Totals

Total	Type	Segments	Words	Characters	Percent
Files:4 Chars/Word:5.02	PerfectMatch	19	219	1001	34.49%
	Context Match	2	4	28	0.63%
	Repetitions	17	30	229	4.72%
	Cross-file Repetitions	1	7	35	1.10%
	100%	4	22	130	3.46%
	95% - 99%	1	20	91	3.15%
	85% - 94%	2	14	74	2.20%
	75% - 84%	1	7	39	1.10%
	50% - 74%	0	0	0	0.00%
	New/AT	37	312	1561	49.13%
	AdaptiveMT Baseline	0	0	0	0.00%
	AdaptiveMT with Learnings	0	0	0	0.00%
	Total	84	635	3188	100%

This type of technology benefits both translators, by making them more efficient and consistent throughout a translated document, as well as offering significant benefits to the client, since they will usually not pay the full cost for repetitious segments of text.

However, CAT tools do not produce “machine translations”; they simply aid the translator in their work by making them more efficient, automatically checking for errors and untranslated text, suggesting terms and previous similar translations, and more. Therefore, a translation performed using a CAT tool is still entirely a human translation.

In addition to their core functionality, CAT tools have evolved to include a variety of other tools and add-ones, including spell checkers, grammar checkers, terminology managers and databases, and content management systems. They are also able to integrate with a variety of translation management platforms and allow teams of translators to work on a single project together.

For projects that involved “editable” content (i.e., files provided in their original format which the CAT tools are able to penetrate) and are repetitive in nature or are expected to be updated regularly in the future, CAT tools may be applied. It is important to note, however, that CAT tools cannot usually be applied to documents provided in hard copy or scanned formats. While Optical Character Recognition (OCR) technology is able to penetrate some types of these texts and provide an editable output, the time required to re-format and correct any OCR errors can far outweigh the benefits of applying a CAT tool for the translation.

How long will it take to complete my translation project?

The time needed to complete a translation depends on a number of factors, including the length of the document (i.e., number of words), subject matter, and any formatting requirements. Generally speaking, the daily capacity for a translator is approximately 2,000 words per day, with additional time needed for editing/proofreading and review. If you are under a tight deadline, however, expedited (“rush”) translation processing is also available from many LSPs, which can often be completed within 24 hours, depending on the size and nature of the material to be translated. However, the more time you are able to allow for a translation to be completed and thoroughly reviewed, the better. In other words, do not leave your translations until the last minute, if you can help it!

What is the difference between “Simplified” and “Traditional” Chinese?

When referring to written/document translation, the options are either “Simplified” or “Traditional” script. Generally speaking, “Simplified” script is appropriate for a target audience in China or Singapore, while “Traditional” script would be used for Taiwan or Hong Kong.

“Mandarin” and “Cantonese” refer to two of the main spoken dialects of Chinese, and not to the written forms of the language. The written form of the language is fairly standard, irrespective of “dialect,” and therefore is only classified only as “Simplified” or “Traditional.”

For translations intended for Chinese speakers in the United States, you

would need to first determine where the largest proportion of Chinese speakers in the area originated from. For many years, "Traditional" script was the standard for written Chinese in the diaspora, but with the significant increase in immigration over the last two decades from Mainland China, that is no longer necessarily the case, and many Chinese translations are now offered in both "Simplified" and "Traditional" script.

Which dialect of Spanish do I need for my translation?

The two main "dialects" of Spanish are Peninsular (Castilian) Spanish for Spain and Latin American Spanish. However, within each of those exist numerous sub-dialects specific to different countries and regions.

While translations can be provided into "Mexican Spanish" or "Colombian Spanish," for example, the written language does not diverge as much as the spoken form of the language. Therefore, unless a translation is targeted for a specific country or region, a universal form of "Latin American Spanish" is typically recommended for translations to be used in Latin America, or Castilian Spanish for translations to be used in Spain.





There is no doubt that language services industry has developed an indispensable role in the new global economy. Whether you are looking to sell and market your services in international markets or expand your local business by increasing outreach to Limited English Proficient (LEP) communities, language services need to be an integral part of your overall business development and marketing strategies in order to remain competitive and expand your customer base.

Government agencies also have requirements defined by law and executive orders to provide foreign language support and access to their communities and should, therefore, have robust language plans to deal with providing access to vital documents and interpretation support in the predominant foreign languages spoken in the constituencies they serve.



If you have more questions or would like to discuss your language needs further, please contact us at www.latitudeprime.com and one of our language professionals will be happy to assist you!



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