

Rudy Tirry

## European Language Industry Survey

### Abstract

Met de jaarlijkse bevraging van de Europese (ver)taalsector peilen de internationale vakverenigingen uit de sector, gesteund door het Directoraat-Generaal Vertaling van de Europese Commissie en het EMT universiteitsnetwerk, naar de verwachtingen en bekommernissen van al diegenen die in deze sector actief zijn.

Daarmee vormt dit onderzoek een aanvulling op het werk van internationale marktonderzoekers en nationale verenigingen die via specifieke enquêtes de zakelijke en operationele realiteit van de sector in kaart brengen.

Elk jaar behandelt de bevraging nieuwe thema's die actueel zijn voor deze snel evoluerende sector maar de kern van het onderzoek is sinds 2013 ongewijzigd gebleven zodat nu ook lange-termijntrends zichtbaar worden.

### 1. Objective

In 2013, the European Union of Associations of Translation Companies (EUATC) initiated the European Language Industry Survey to fill a gap that existing private surveys and public statistics had left open.

The established surveys, such as those run by the specialized market research companies CSA and Nimdzi, or by national or international associations such as Tekom and the American LCI, were typically designed to obtain business and operational data that describe the current state of affairs in the industry, or they provided a benchmark against which individual companies could compare their own operations and performance.

What seemed to be missing was the expectations and concerns of those who are active in the language sector, critical elements that professional associations and policy makers need to take into account in order to prepare for the future.

These expectations and concerns are at the heart of the European Language Industry Survey. Are those involved optimistic about their future in the industry? Do they have expansion plans? What are their main challenges? What is the impact of new technologies on their activities? Can they find the right resources?

### 2. Scope

Today the annual European Language Industry Survey is supported by other international associations that are active in the European language industry (Elia,

FIT, GALA) as well as by the European Commission's Directorate-General Translation (DGT) and the European Master's in Translation (EMT) university network.

As other organizations joined the original EUATC effort, the response rate increased dramatically, and so did the scope of the survey topics that needed to be addressed to meet the requirements of each organization. Rapid technological developments in the language industry added new topics as well.

Today's survey, therefore, covers a wide variety of topics, from macro-economic business expectations to detailed operational practices. Care has been taken to keep the survey completely anonymous. The items mainly ask for data ranges rather than absolute data, since the latter are often not readily available to respondents.

The results are analysed according to various components that make up the respondent profile, such as gender, number of years in the industry, respondent type and size segment (for companies).

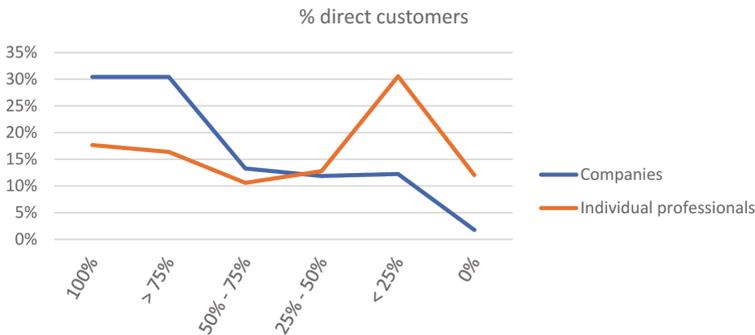


Fig. 1: Variation between different respondent types (in this case regarding the percentage of direct customers)

This approach has revealed interesting variations between different respondent types such as translation companies and individual translators.

### 3. Consistency

To provide reliable trends over a longer period of time (despite the need for constant topic diversification), each edition of the survey contains an identical set of questions about market and business evolution, as well as several identical open questions about trend expectations.

These questions cover topics such as general market activity, competition, pricing and staffing as well as requirements in terms of certification or the GDPR (General Data Protection Regulation), a more recent addition to the list.

By comparing real data from the previous year with expectations for the current year, the survey is able to identify how companies and professionals adapt their business behaviour to earlier evolutions.



Fig. 2: Trend analysis of real and expected market activity

	# Companies	Invest	Disinvest	Certify	Sentiment	2015	2016	2017	2018	2019
Austria	10	14	1	0	13	😊	😊	😞	😊	😊
Belgium	14	9	1	1	8	😞	😊	😊	😊	😊
Croatia	14	15	0	9	15				😊	😊
Czech Republic	5	6	0	0	6					😊
Estonia	5	4	0	0	4	😊	😊			😊
Finland	14	11	3	1	8					😊
France	15	12	4	4	8	😊	😊	😊	😊	😊
Germany	18	18	2	10	16	😊	😊	😊	😊	😊
Greece	5	6	0	2	6					😊
Hungary	8	10	3	2	7					😊
Italy	17	15	2	3	13	😊	😞	😊	😊	😊
Lithuania	7	7	2	2	5					😊
Netherlands	12	18	1	8	17	😊	😊	😊	😊	😊
Poland	15	12	0	6	12				😊	😊
Portugal	11	13	0	7	13	😊	😊	😊	😊	😊
Romania	7	3	0	1	3				😊	😊
Russia	6	6	0	2	6					😊
Slovenia	9	13	0	7	13			😊	😊	😊
Spain	25	16	2	10	14	😊	😊	😊	😊	😊
United Kingdom	20	26	4	9	22	😊	😊	😊	😊	😊
	11,7	1	4	10,7		😊	😊	😊	😊	😊

Table 1: Investment/disinvestment mood indicator

Possibly the most striking illustration of the need for this consistent approach is the mood indicator. This indicator analyses reported investment and disinvestment intentions to derive the mood of the market in individual European countries.

This question was added to the 2015 edition of the survey and has remained unchanged until today, which ensures an uninterrupted data set over a 5-year period. The results from the investment/disinvestment question can be cross-checked with the answers to other market evolution questions to increase or question the reliability of the conclusions.

Based on the responses to the other questions, this is most likely linked to the expected continued growth of the market (see Table 1).

Data such as these are inherently subjective in nature and need to be handled with care. For this reason, the mood indicator only considers markets for which the number of responses is considered sufficiently representative.

In Figure 3, only countries with a sentiment ratio (sentiment value divided by number of respondents) higher than 1 appear as green. As of edition 2020 of the survey, this threshold will be set at 0.5.

## **4. Open questions**

The European Language Industry Survey deliberately uses a number of open questions. Although such questions are particularly difficult to analyse and interpret, they invite respondents to give their candid opinion regarding trends and challenges, conveying how strongly they feel about them.

The open questions also reveal information that the authors of the survey could have overlooked, such as new language tools introduced to the market, which can be integrated in later editions of the survey.

## **5. Topic diversification**

Diversification is dealt with by gradually adapting existing questions, by removing, adding or modifying answer options, or by removing existing questions that no longer provided new insights and adding new questions to cover new aspects of existing topics or to address entirely new topics.

The 2019 edition of the survey covered new items such as the relationship between freelance translators and translation companies and modified the already existing questions about challenges relating to machine translation usage, copyright practices and skill gaps identified by recruiters and universities.

## **6. 2020 and beyond**

The 2020 edition of the survey breaks with the tradition of having all respondents replying to all questions.

Several participating associations had expressed the wish to cover a number of topics in more detail that are specifically targeted at their own segment, such as the freelance community. This is not possible in a monolithic approach since it would make the survey too long for all respondents. It was therefore decided to dedicate specific sections of the survey to particular respondent types.

Thus, the 2020 survey logic leads each respondent through a subset of questions. Some are identical or similar for all respondent types to allow for comparison between segments, but many are completely different and only relevant for a particular segment. This will allow the participating associations to obtain detailed information to define more targeted actions for their specific segments. This new approach will be evaluated and refined in future editions.

## **7. Caveat**

The exact size of the European language industry is uncertain and the number of active players and their type makes it even more so. It is therefore difficult to ascertain how reliable the results are from a given number of respondents.

This is particularly true for the questions that relate to opinions and expectations, which are at the core of this survey. The answers to a particular question cannot be analysed in isolation, therefore, but have to be compared and cross-referenced with other questions relating to the same topic or trend.

Despite this element of subjectivity, which any user of the survey report has to be aware of, the survey is widely recognized as a good instrument to take the pulse of the European language industry and a useful tool to define or adjust policy measures and operational practices.

