

INTERNATIONALIZATION AND LOCALIZATION: WHAT DOES IT MEAN?

By Beth Podrovitz, Jiri Stejskal, PhD, and Angèle Surault, CETRA



With an increasing number of marketing research studies being conducted on an international level, some of the greatest challenges researchers face are languages they don't speak and cultures that are unfamiliar to them. The need for good translation is vital; however, the need for internationalization and localization of the survey materials is of equal importance. Failure to adequately incorporate all three of these elements into your international study can significantly impact the results of your research efforts.

Internationalization is a process of generalizing a document, such as master questionnaire, so that it can handle multiple languages and cultural conventions without the need for substantial modification. For example, the demographic section of a screener that works well in the United States

could be irrelevant, puzzling, or offensive in other countries. Another example is the use of toll-free numbers, which will not work outside of the United States. **Internationalization facilitates localization.**

Localization is a procedure through which the translator replaces a culture-specific aspect of a document from the source culture with an equivalent appropriate to the target culture to accommodate the expectations of the target audience. Using the examples above, a demographic section can be localized by omitting questions regarding race, as well as using different education and income levels. Below you will find a few tips on how to internationalize and localize your marketing research materials.

Information on the target population.

The importance of providing information on the target population (population of interest) to the translator cannot be overemphasized. The intended audience cannot always be inferred from the questionnaire and it is not up to the translator to assume who the target population is. It is imperative that you discuss the target audience with your language services provider (LSP), as well as the expected register or formality of the study.

For example, in many languages the gender of the respondent will influence the

translation as the translator will have to adapt the syntax to be gender-specific. In other languages, the level of authority of the respondents will impact the register of the translation. Speaking from our own experience, in one marketing research project for Apple we made an incorrect assumption when translating a survey about iPods into Japanese. We decided to use an informal register, such as is normally used when addressing iPod-carrying young people who are likely to be more responsive to a less-formal study. It turned out that the Apple company wanted exactly the opposite, a super-formal Japanese.

This information was not communicated to us and the translated survey had to go through a major revision.

Another example is a Mary Kay study – some of the translators were unaware that all Mary Kay sales representatives are women, and the translated survey had to be reworked to be gender specific.

Conversion of currency ranges

A poorly localized screener and questionnaire may significantly impact your research efforts. When dealing with currency conversion, it is critical to inform



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your LSP whether or not to convert currency (there is no need to convert currency if the study is conducted in the United States, but your LSP needs to know that). Typically, doing a straight currency conversion for non-US studies is not adequate, particularly in a screener where potential respondents may be disqualified based on income or revenue levels. It is not enough to convert from US Dollars, the breaks must be localized for your target audience because cost of living and currency exchange rates vary. However, improper localization of income breaks or revenue levels in the screener may impact the incidence rate and/or the analytical results.

For example, terminating companies with a yearly revenue below \$1 million might be appropriate in the United States when targeting medium to large companies, but such segmentation would be inappropriate for research conducted in a third world or developing country. While the LSP can provide suggestions and consult on the matter, it really is up to the marketing research firm to work with the end-user to determine the best, most relevant breaks for each locale.

Clients who insist on maintaining the same income, revenue, or education breaks and just translate them into whatever language, risk undermining the integrity of the data collected which could ultimately be counterproductive to the research objectives. Research on appropriate ranges in the target country is a must.

For B2B surveys, it may be more accurate to segment by the number of employees or other criteria not tied to the currency rather than using annual revenue.

Demographic questions

Improperly localized demographic questions may reflect how much (or little) the company represented in the survey respects the respondents, their culture, lifestyle, etc. If the demographic section is not localized well, the respondents may become offended or annoyed and doubt that the company is legitimately interested in their opinion. For example, questions about ethnicity are unacceptable in most countries and asking the respondents about their racial origin is sure to trigger a negative

attitude that might impact other parts of the study. Another area that requires considerable attention and research is levels of education.

These are difficult to localize, because each country has its unique educational system which rarely corresponds to that of the U.S.

For example, many countries do not follow the Bachelor – Master – Doctor sequence in college education and award degrees that are somewhere in between or even beyond PhD. Similarly, primary and secondary schools have different systems of grades, and quite often a high school diploma from a foreign country is close to a B.A. degree in the U.S. Marital status could also be a minefield difficult to navigate. Consider the French “PACS” – a *pacte civil de solidarité* (civil pact of solidarity) – which is a form of civil union between two adults (same-sex or opposite-sex).

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Cultural sensitivity

In addition to considering the target population, currency ranges and demographic questions, a properly internationalized and localized study will also take into account the use of idiomatic expressions, metaphors, illustrative examples and many other aspects of cultural adaptation. Idioms are terms which require knowledge of the local culture.

Take, for example, the expression, “at the bottom of the totem pole.” This idiom is unique to the U.S. and it is important that the translator is conveying the meaning “someone who is unimportant” rather than providing a literal translation. The same can be said of metaphors, particularly when it comes to sports.

To the U.S. respondent, “Hail Mary” will be associated with football, whereas abroad it will be associated with the Catholic Church. A properly internationalized document will steer clear of such expressions; if this is not possible, it is important to communicate with the LSP and come to an agreement as to what should be done in such instances. Illustrative examples, such as Wal-Mart as an example of a mass merchandiser, pose a similar problem in countries where there is no Wal-Mart or similar-type store.

It is not the translation alone that affects how you communicate with survey participants in languages other than English. Internalization of the study prior to the translation and its localization during the translation process will go a long way toward a successful marketing research project and a happy end client. Cooperation with a competent LSP is instrumental in achieving such success. When selecting a LSP for your international projects, keep in mind our favorite idiom: If you pay peanuts, you get monkeys! ☐

Beth Podrovitz is the Director of Operations, Jiri Stejskal, PhD, is the President, and Angèle Surault is a Project Manager of CETRA, Inc. They can be reached at 215-635-7090 or at info@cetra.com.

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Paul Gauthier, CMRP - paul@networkfield.com
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