

# Learning across borders

A survey of localization practices in corporate training and development



## Contents

<b>Executive summary</b> .....	<b>3</b>
<b>More than 300 professionals surveyed</b> .....	<b>5</b>
A first look at the localization of enterprise training .....	5
Participants .....	5
Participant organizations .....	7
<b>One size doesn't fit all: why training localization matters</b> .....	<b>8</b>
What does successful training look like? .....	8
How does localization contribute? .....	9
Training mechanisms and languages .....	9
<b>Localization importance reflected in practice</b> .....	<b>10</b>
Who makes the decisions – and what are they choosing to do? .....	10
Different content types are equally important to localize .....	11
<b>Different approaches for different needs</b> .....	<b>12</b>
Cultural nuance a bigger obstacle than budget? .....	12
How the issue of cultural nuance is being addressed .....	13
What about the issue of in-house resource? .....	13
Human in the loop .....	14
<b>Making the right choices</b> .....	<b>15</b>
Where to now? .....	15
Best practices for localization of training content .....	16
The role of technology .....	16
What to look for in a partner .....	17

## Executive summary

### A note on survey scope and terminology

This research covers corporate training delivered by enterprises to their employees or to partner organizations such as resellers, dealers and franchisees. It does not address training in academic environments.

We use 'employee' or 'learner' as shorthand for all the recipients of such training, which may be delivered online (live or on-demand, typically referred to as eLearning), in person or a mix of both (hybrid).

The industry uses various terms to refer to what it does, including 'training', 'training and development', 'learning', 'learning and development' and 'eLearning'. In the survey and in this report, we use these terms interchangeably, as synonyms.

Towards the end of 2023, we partnered with **Training Industry** to conduct a survey of more than 300 learning and development (L&D) professionals, predominantly from large organizations in North America, Europe and Australasia. Our objective was to understand their attitudes to, and adoption of, localization practices for training content.

To our knowledge, nobody has put the localization of training content under the spotlight like this before. Anecdotally, L&D professionals believe that training is most effective if it caters to the learner's native language and the cultural realities of their location. But we wanted to know if this is reflected in practice when enterprises offer training to their employees.

The good news is that the training industry seems to be putting its beliefs into practice. On average, the enterprises we surveyed are translating or localizing almost three-quarters (73%) of their learning content. They regard localization as important across a wide variety of training, from onboarding to leadership development, from sales skills to product and service training, from technical courses to compliance requirements. Half of them (50%) expect to localize even more training content in the next 12 months, seeking to deliver a better learning experience, higher rates of completion and improved job performance.

Their journey towards effective localization does have its challenges, but overall, these organizations aren't experiencing a lack of leadership support or budget to support existing needs. Instead, they cite the adaptation of training content to incorporate cultural nuance, the capacity to support localization at current staffing levels, and a lack of in-house resource or expertise as their top localization challenges.

While there are some clear geographical differences, generally we see an industry worried more about how to localize training content efficiently and ensure its quality, than about the need to do it at all – reinforcing the view that the industry recognizes the value of localization in delivering better training results.

**Enterprises are translating or localizing 73% of their learning content**



Different geographies are managing their localization programmes somewhat differently. For example, North American organizations are more likely to outsource localization, presumably because they feel more challenged by a lack of in-house capacity or skills. In the final section of this report, we offer some pointers on what to look for in a training localization partner, along with some best practices for localizing training content.

We also reflect on how technology can help the training industry become more efficient at localizing its content. The survey shows that use of machine translation is quite common – but importantly, more so with human review (post-editing) than without.

The preference for human involvement – either as primary translators or in partnership with machine translation – is striking. L&D professionals recognize the role that human insight plays in providing essential cultural and linguistic nuance.

We are delighted to see how seriously the training industry is taking localization. The survey paints a picture of enterprises actively aligning their practices with the recognition that localized training is more engaging and effective. This is good news for enterprise learners worldwide.



## More than 300 professionals surveyed

### A first look at the localization of enterprise training

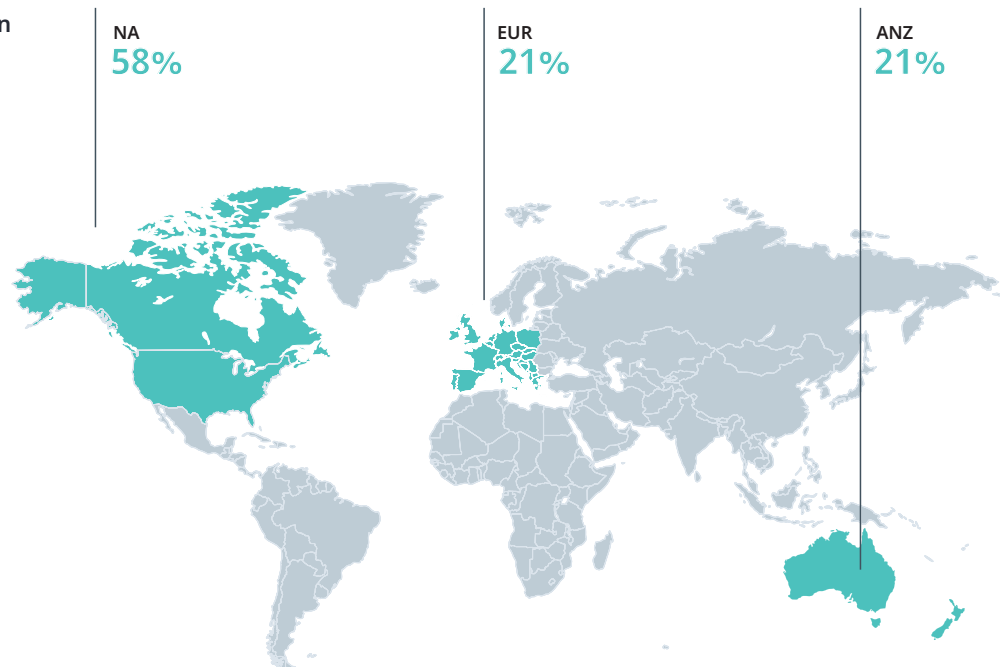
Towards the end of 2023, in partnership with **Training Industry**, we conducted a survey of more than 300 L&D professionals to understand their attitudes to, and adoption of, localization practices for training content.

In this report, we delve into the results of this survey – to our knowledge, the first of its kind. We examine why L&D localization is important to these enterprises, how they are getting it done, and what it means for the industry – both those at the forefront of training localization and those who might be a little behind.

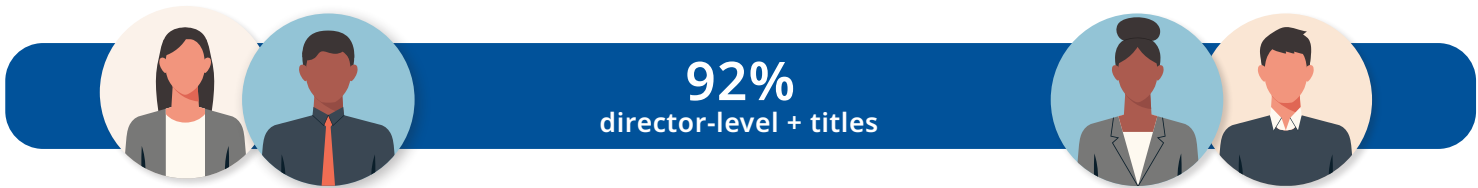
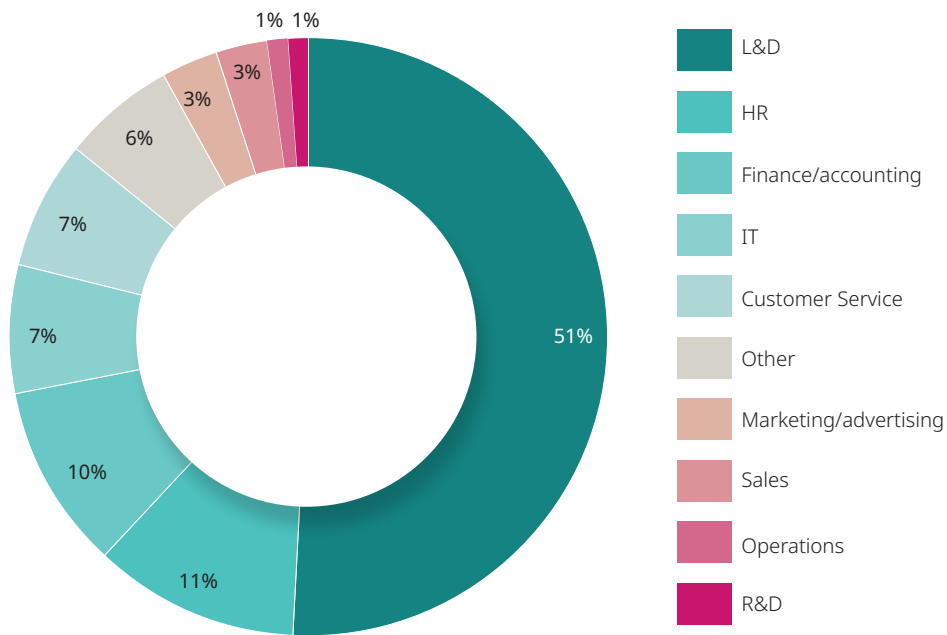
### Participants

There were 317 survey participants from North America (NA: 58%), Europe (EUR: 21%) and Australasia (ANZ: 21%), almost all (92%) at director level or above. Just over half (51%) have a specific L&D function within their organization, with another 11% from HR more generally, giving a total of almost two-thirds (62%) from L&D/HR. The same proportion (62%) are frequently or always involved with the development of learning content themselves, with another quarter (25%) involved as needed.

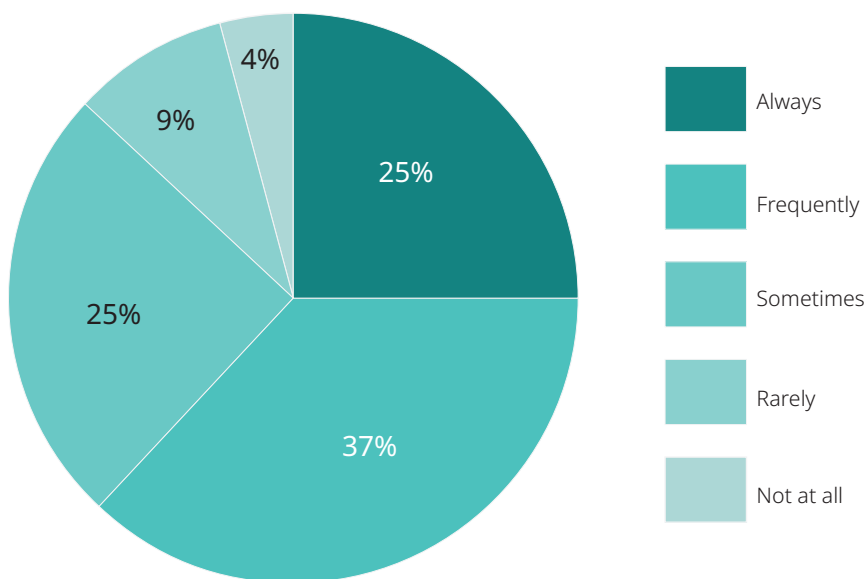
### Geographic distribution 317 respondents



Departments represented



Personal involvement with the development of learning content



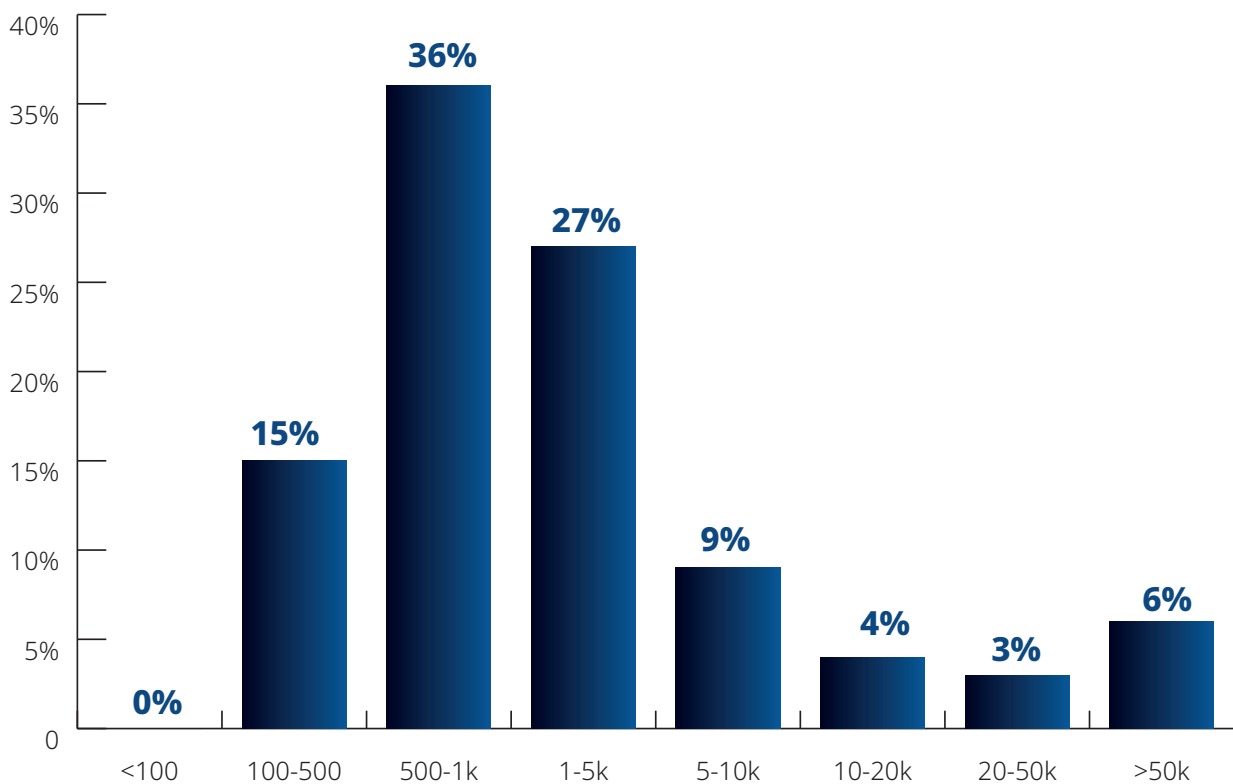
### Participant organizations

Unsurprisingly, the vast majority of respondents work within large enterprises (which historically are more likely to have both the need and resources to invest in formal L&D activities). Fully 85% represent organizations with more than 500 employees and none are from organizations with fewer than 100 employees.

Around a dozen sectors are represented, the largest being technology and telecommunications (24%), with smaller numbers from manufacturing (both industrial and consumer products), life sciences, government and others.

### Organizational size

(no.of employees)



## One size doesn't fit all: why training localization matters

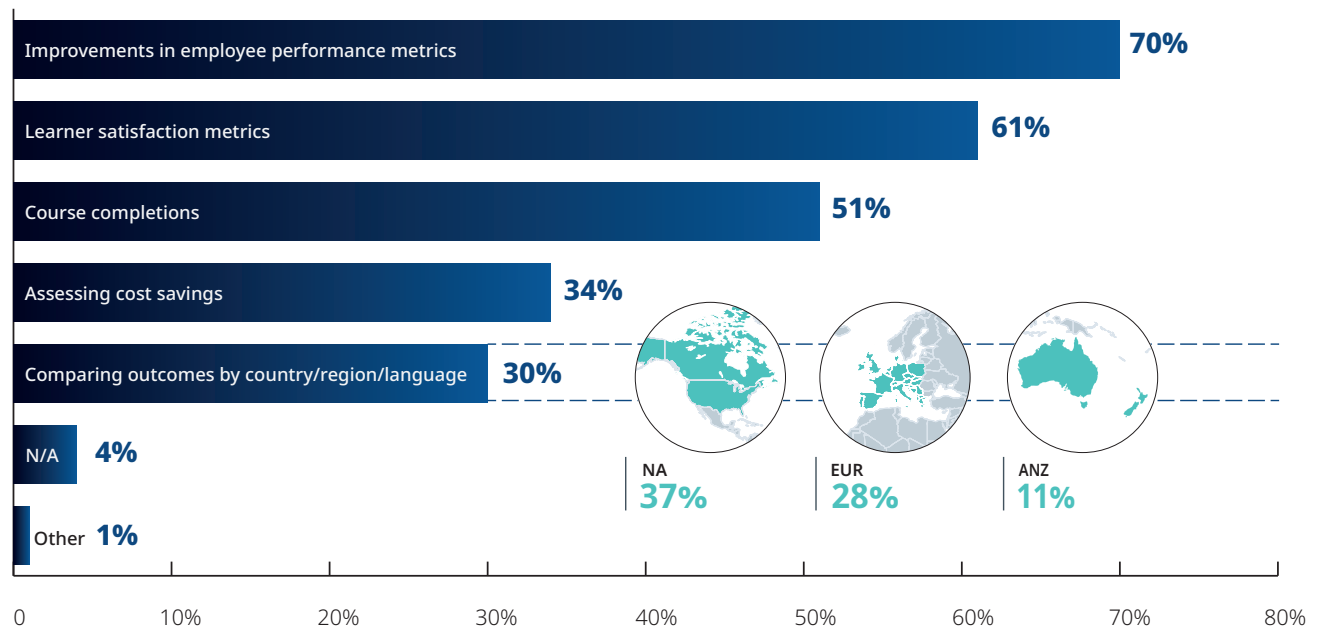
### What does successful training look like?

The survey shows that enterprises primarily measure the return on investment (ROI) of their learning programmes by their impact on employee performance (70%) and/or satisfaction (61%). The only other ROI metric used by at least half is course completions (51%).

From a localization perspective, it's interesting to note that a healthy minority (30%) also measure outcomes by country, region or language –

recognizing that one size doesn't fit all. This applies especially in North America, where it's 37% (vs. just 11% for Australasia). While we may think of North America as monolingual, the reality is that many large North American organizations have an international workforce to cater to, and are also committed to investing in local speakers of other languages, especially Latin American Spanish and Canadian French.

### Measures used to evaluate ROI of learning programmes



### Why do you localize learning content?

Better learning experience	65%
Higher rates of completion	62%
Improved employee job productivity/accuracy	50%
Regulatory requirement	29%
Accessibility	22%
Other	2%



### How does localization contribute?

Localization contributes directly to the three top ROI metrics, especially to learner satisfaction by delivering a better learning experience (62%). Fundamentally, enterprises include localization as part of their organizational training strategy because they recognize that the outcomes are directly linked to how well their training materials are understood, and that almost all learners will understand concepts and remember facts more easily when the content is presented in their preferred language and adapted to their cultural environment.

We see this recognition – which can be summarized as ‘one size doesn’t fit all’ – in the **two top triggers for localization: the need to improve international training outcomes (51%) and to personalize learning (48%)**. Both reflect how localization is used to help meet the distinct characteristics or needs of different people to improve L&D outcomes.

Strong minorities of respondents also see the localization of training content as a means of gaining a competitive advantage (40%) or as a key support for international expansion of the business (36%).

#### Triggers for implementing content localization as part of the organizational training strategy

Need to drive better outcomes in international training	51%
Need to personalize learning for employees	48%
Competitive advantage	40%
Supporting learning culture	37%
International expansion of the business	36%
Addressing performance/skills gaps	34%
Employee retention/engagement	28%
Aligning with desired business outcomes	14%
Other	1%

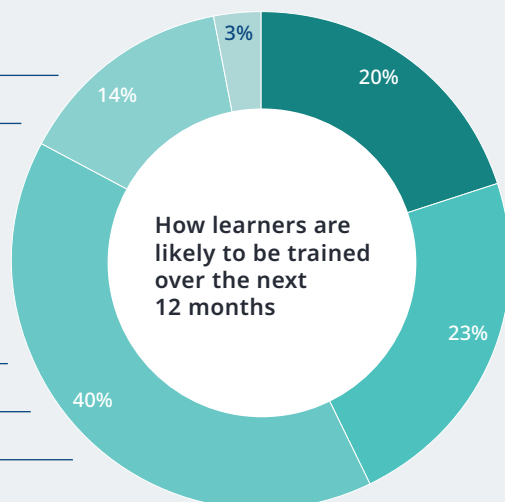
### Training mechanisms and languages

The recognition that ‘one size doesn’t fit all’ is also reflected in how enterprises intend to deliver training, with the largest proportion (40%) choosing a more-or-less equal balance between in-person and virtual training. Despite the general view that COVID-19 has forever changed people’s attitudes to virtual working, only 17% are choosing to offer training that is mostly (14%) or almost fully (3%) virtual, with 43% preferring training that is mostly (23%) or almost fully (20%) in-person.

With English the common source language for the organizations surveyed, they’re localizing training into a number of common languages.

#### Target languages

Spanish	40%
German	23%
French	22%
Italian	18%
Chinese	12%
Japanese	8%
Korean	5%
Portuguese	5%
Other	3%



- 20%**  
Almost fully in-person
- 23%**  
Hybrid: mostly in-person
- 40%**  
Hybrid: balanced
- 14%**  
Hybrid: mostly virtual
- 3%**  
Almost fully virtual

## Localization importance reflected in practice

### Who makes the decisions – and what are they choosing to do?

Decisions about the localization of learning content don't always sit with just one part of an organization. In fact, almost half (49%) of the respondents selected more than one option from the decision-making choices offered.

So it's surprising that only 38% include L&D or HR functions among the localization decision-makers in their organizations – especially since more than 60% of the respondents are from L&D or HR and at director level or above. It's an accepted norm that these teams are involved in such decisions, even if not as the sole or primary decision-makers, which does make this result puzzling.

Who makes decisions about localizing learning content?	
Company leadership (e.g., CEO, SLT)	54%
L&D/HR	38%
One specific team (e.g., localization, marketing, non-L&D/HR)	35%
Decided based on geo/region/language	31%
Ad hoc approach	15%
Other	2%

**73%**  
of training content is currently translated or localized (overall average)

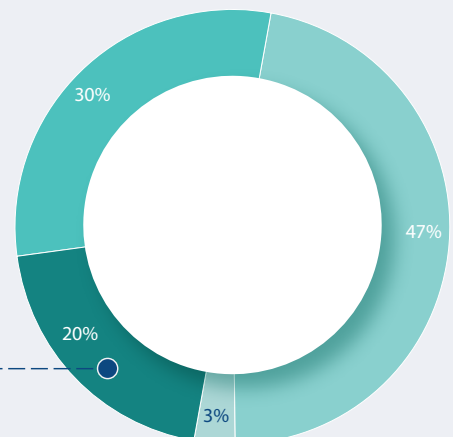
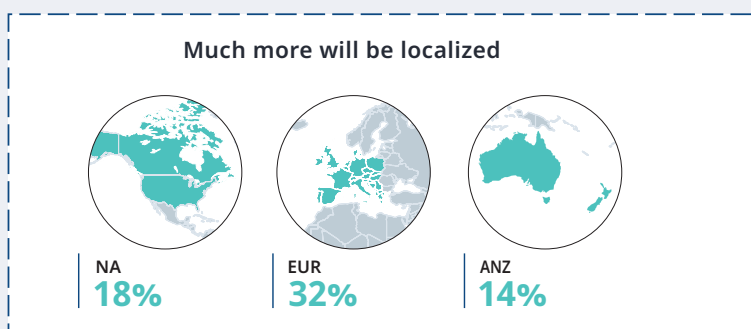
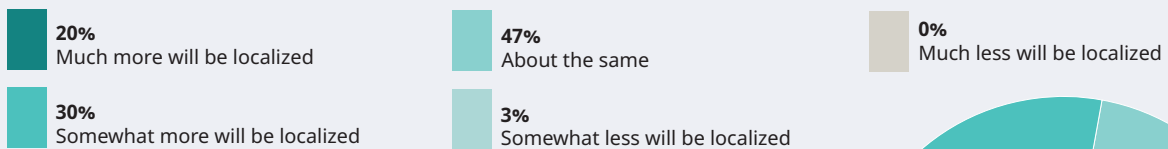
For more than half of the respondents (54%), the localization of learning content is sufficiently important to involve company leadership in decisions about it. Even when decisions are made elsewhere, the importance of localizing training comes through loud and clear as, on average, these organizations are localizing almost three quarters (73%) of their training content.

And this is set to increase. In the next 12 months, **half (50%) plan to localize more of their training content**, and just under half of these (20% overall) will be localizing much more (rather than somewhat more).

Europe is keenest to increase localization, with just under a third (32%) set to localize much more.

Hardly any respondents (3%) feel they will be localizing less content.

### Plans for localizing training content in next 12 months



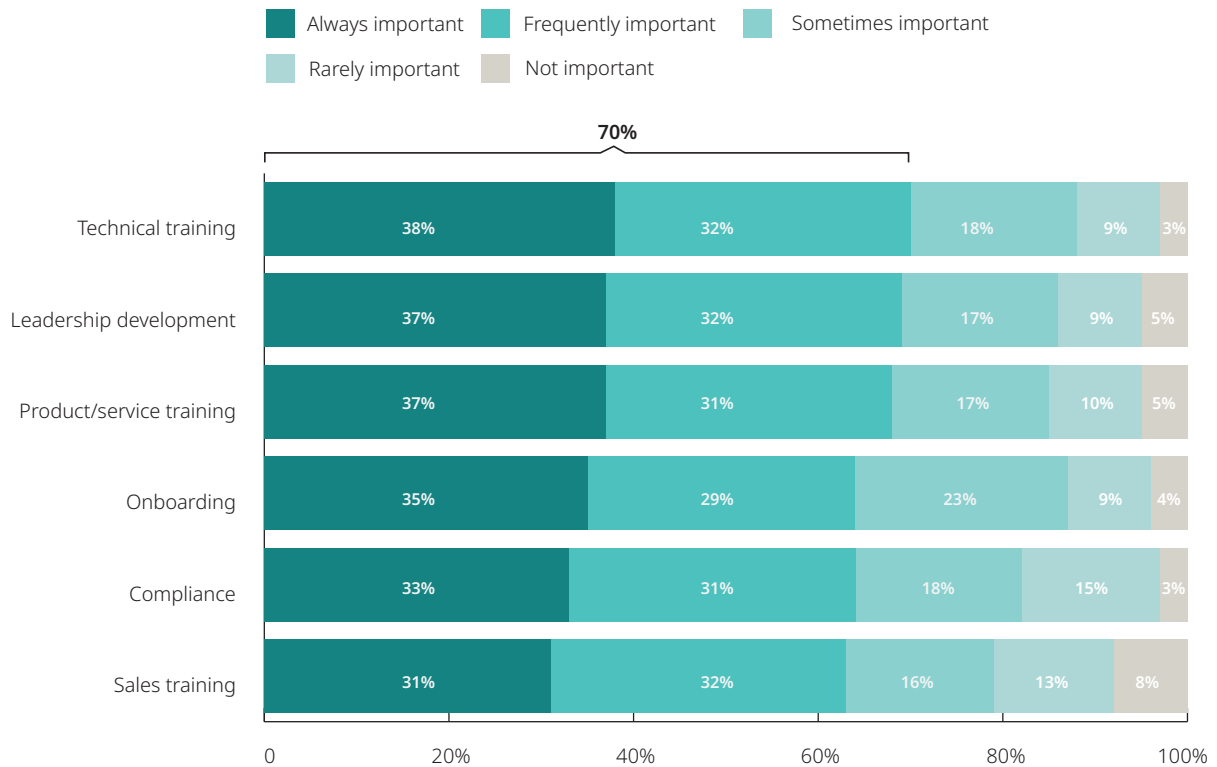
### Different content types are equally important to localize

The value placed on localization of training content is further illustrated when we look at how important it's regarded to be for different types of content. We asked the respondents to rate the importance of localization for six different content types, and all six came out with similarly high ratings: for technical training (at one end of the range), 70% rated localization as frequently or always important, while for sales training (at the other end), it was 63% – just 7 percentage points separating all six content types.

The only geographic difference of note is that for compliance content, 50% of European respondents consider localization to be 'always' important, compared with 31% for North America and 20% for Australasia. This makes sense if we assume that these organizations have more of a focus on Europe and the European Union, with its plethora of regulatory requirements.

Again, these results very clearly signal the importance to these enterprises of localizing their training content.

### Importance of localization for different learning materials



## Different approaches for different needs

### Cultural nuance a bigger obstacle than budget?

The importance of localization in training is further illustrated when we look at the obstacles faced when localizing content.







The number one challenge of incorporating appropriate cultural nuances (42%) has more to do with how well localization is done (in other words, going beyond mere translation to 'proper' localization) than with just getting it done.

Additionally, lack of in-house capacity (39%) or resources/expertise (36%) are considered more of an obstacle than lack of leadership support (28%) or budget (27%) – reinforcing the idea that enterprises are dealing more with questions of *how* best to achieve localization than whether it should be done at all.

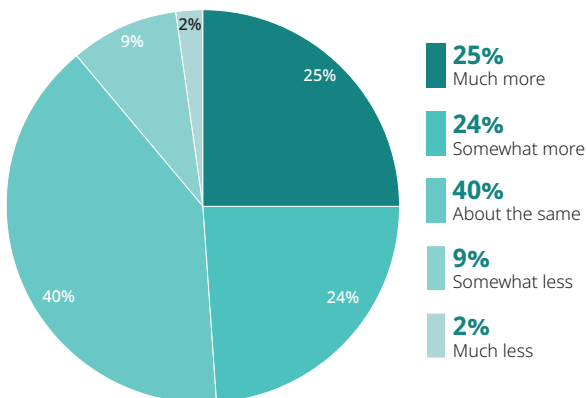
It's worth noting, however, that this pattern is heavily influenced by the North American responses, with the top two obstacles perceived as much more of an issue for them than for the other two geographies.

By contrast, in Europe the top six obstacles are pretty evenly balanced, with only six percentage points separating top and bottom.

Nevertheless (and somewhat to our surprise), the availability of budget for localization doesn't seem to be a major obstacle for most of the respondents. This is also reflected in the fact that half (49%) of them say **they expect to have a larger localization budget for L&D content in the next 12 months**, while 40% expect it to remain about the same. There's an almost even split between those expecting a much bigger budget (25%) and a somewhat bigger budget (24%).

Obstacles to localizing learning content		Geographical differences in top two obstacles		
Incorporating appropriate cultural nuances	42%	 53%	 29%	 25%
Capacity of L&D personnel at current staffing	39%	 49%	 32%	 20%
Lack of internal resources/expertise	36%			
Addressing learning needs of different markets	34%			
Lack of leadership support/prioritization of training	28%			
Lack of budget	27%			
No internal L&D champion for localization	6%			
Other	2%			

### Likely change in L&D localization budget for next 12 months



### How the issue of cultural nuance is being addressed

If North American enterprises are more keenly aware of the challenge of incorporating cultural nuance into localized content, they're also more determined to do something about it.

We see this in the localization methodology followed by the different geographies, with North America twice as likely to create training content in multiple languages simultaneously (63%) than to create it in one language before localizing to others (30%).

This matters, because when localization is considered and implemented early in the development of training materials, then the design of course structures, content and formats can take account of different linguistic and cultural needs from the start, reducing duplicated effort, saving time and ultimately leading to better results.

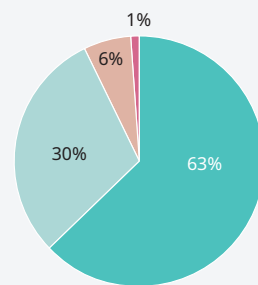
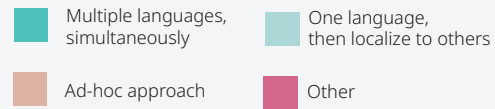
The other two geographies, by contrast, are more likely to create content in one language and then localize it. In fact, Europe is almost three times more likely to follow this methodology (62%) than to create training content in multiple languages simultaneously (22%).

### What about the issue of in-house resource?

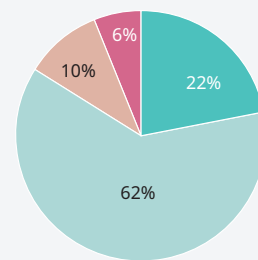
The survey also shows what North American organizations are doing about the other concern that stood out for them: their relative lack of in-house capacity to support the localization of learning content. They are much more likely than their counterparts in Europe and Australasia to outsource their localization work (65% for NA, 47% for EUR, 35% for ANZ), whereas organizations in Europe and Australasia prefer using in-house resources (66% for EUR, 62% for ANZ, 58% for NA).

In fact, only 18% of North American organizations rely entirely on in-house resources for localization, compared with 29% for Europe and 43% for Australasia. And of the 65% of North American enterprises outsourcing localization, just over half of those (33%) rely entirely on outsourcing.

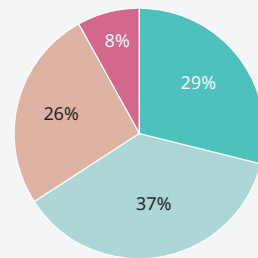
### Which best describes your organization's methodology for creating localized training content?



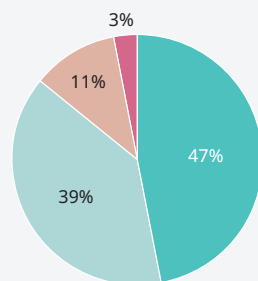
NA



EUR



ANZ



All respondents

North American organizations are also much more likely to use machine translation, either with human review (70% for NA, 47% for EUR, 31% for ANZ) or without it (51% for NA, 41% for EUR, 18% for ANZ).

**How does your organization manage localization?**

	NA	EUR	ANZ	ALL
We use in-house resources for localization	53%	66%	62%	58%
We outsource with a localization provider	65%	47%	35%	55%
Other	9%	10%	14%	10%

**How does your organization manage localization?**

	NA	EUR	ANZ	ALL
<b>ONLY</b> use in-house resources	18%	29%	43%	26%
<b>ONLY</b> outsource	33%	13%	22%	26%

**Methods used to localize content**

	NA	EUR	ANZ	ALL
Human review/refinement of machine translation to fit the culture of different markets	70%	47%	31%	57%
Machine translation	51%	41%	18%	42%
Human translation	35%	54%	32%	39%
A combination of methods depending on the type of content	39%	35%	34%	37%
Unsure	2%	7%	20%	7%

**Human in the loop**

Given how much of their training content enterprises are localizing, the preference to include human language specialists in the process is striking. This usually signals that the content is assigned a high value or contains nuance that can't yet reliably be produced by machine translation technologies alone.

There is, however, enough evidence of the adoption of machine translation and human-machine partnerships here (typically referred to as machine

translation post editing or MTPE) – as well as the matching of localization methodology to content type (content tiering) – to see that it's important to these organizations to engage with new technologies to achieve the right balance of efficiency and quality. It will be interesting to watch developments in this space, as AI technologies continue to advance at pace.

## Making the right choices

### Where to now?

It's good news for employees when the enterprises they work for take training localization seriously. Likewise for **those who work in partner organizations**, such as dealers, resellers and franchises.

As we've seen, enterprises take the time and allocate the resources to localize training content because they believe they derive real benefits from giving learners a better experience. Their learners are more likely to understand, complete and implement the training they are offered, which ultimately improves performance.

Indeed, many enterprises believe that by boosting training effectiveness in this way they get a competitive advantage.

For those not yet investing in localization, we hope this research provides food for thought and the impetus to take action and find out how to reap the benefits. With many L&D professionals under pressure to deliver better results, localization offers a clear pathway to achieving better outcomes. If it's not already a part of your toolkit, it's never too late to start!

Since every organization is unique, there's no single correct way to start a localization initiative, nor any single correct set of methodologies and processes, or tools and technologies, necessary to deliver localized training content. It's worth taking your time to explore the options and talk to the experts to discover what is right for you.

If your organization is already realizing the benefits of localization, you may wish to explore options for doing so more effectively or efficiently. This is especially important if you're planning to localize more content or offer more languages.

The way forward depends largely on your circumstances. After all, 'one size doesn't fit all' applies to your organization as much as to your learners.

It may be that your processes are mature, reliable and scalable, but you have questions on how best to incorporate cultural nuance for better quality outputs. It may be that you're not sure how best to use your in-house capacity and expertise, or that you just don't have enough resources to scale efficiently. Or perhaps you're among those that do have a challenge with lack of leadership support or budget.

Again, there's no single path that is right for everyone, but here are some pointers to help you address some typical challenges.



## Best practices for localization of training content

If – despite its importance – localization is an afterthought in your organization, you may find it difficult to get the best out of the time, money and people you put into it. By ‘afterthought’ we mean that it happens after training materials are developed in an original language, without the needs of localization being considered during this stage of development.

Failure to consider localization from the start often results in difficulties down the line that may have been avoidable. Even if localization is a planned and accepted part of the end-to-end training delivery process, it’s still an afterthought if it isn’t properly considered early enough in the full process.

Assuming you’re giving localization the consideration it deserves from the start, other actions to maximize success include:

- **Tiering your content.** This is about choosing the best method of localization – machine translation (with or without human review), traditional human localization, or concurrent authoring of content simultaneously in multiple languages – for the characteristics of the content. Even within a single training course it’s likely that content can be divided into different tiers, enabling you to find the optimal balance of time, cost and quality to deliver the best possible learning experience.
- **Focusing on the learner.** Keep in mind that the objective is to engage learners so that they understand and remember what they’re learning. If the content is boring, confusing or feels like it was developed for someone else – a different culture or demographic – then it won’t work well. A strong focus on the learner experience is the surest way to achieve the objectives of training.

## The role of technology

When it comes to delivering content that works for different languages and cultures, it’s natural to assume that human input – providing essential cultural insight and linguistic nuance – is a necessary part of the process. But as true as this may be, it doesn’t follow that technology has no part to play. Here are just a few examples of how the right technologies can boost your capabilities:

- **Workflow technologies** can create efficiencies for everyone in the localization process, especially by automating handoffs and other tasks that are time-consuming to do manually. These technologies also usually provide excellent visibility over projects and capture data that can be used to inform future improvements.
- **Translation memories and termbases** ensure that previous work can be reused without effort and that approved terminology choices are applied consistently.
- **Machine translation** can be adapted to your specific content and linguistic needs, freeing human language specialists to focus where it really matters. Not everything needs human nuance and insight, after all.
- **Newer forms of AI such as LLMs** are quickly being adapted to address a variety of purposes, for example in video production to create localized subtitles from a voice track (voice-to-text with translation) or to turn a written script into localized voiceover tracks (text-to-voice with translation).

The right technologies can drive efficiency, speed and scalability. They can help to stretch budgets and make people’s time go further. You may want to invest in some of this technology yourselves, or find a technology-enabled localization partner who can plug you into their existing technology ecosystem and also address any constraints on in-house capacity or expertise.

As always, there’s no one size that fits all, so it pays to have a conversation with an expert team.



## What to look for in a partner

The ideal training localization partner should know how to optimize processes and combine the strengths of people and technology to address the unique demands of L&D content. They'll know how to:

- Deal with in-person vs. virtual training.
- Handle the many different content formats – often complex combinations of text, graphics and video – involved in training content.
- Work with any digital learning platform and help with any (or every) part of the process, from instructional design to linguistic and functional testing.
- Use machine translation and other AI technologies appropriately – and also know when not to.
- Bring not just their cultural and linguistic expertise to the table, but also an understanding of different learning styles and accessibility needs.
- Help you place localization at the heart of training development so it's no longer an afterthought.
- Handle any language and manage any volume that you need.

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**“Whenever we are looking for solutions, we simply ask, and RWS provides feedback and ideas... We are glad to have a partner who is reliable and has capabilities that we might not need now but could possibly use sometime in the future.”**

**Oliver Gassner**

Head of European Training

**Honda Motor Europe**



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