



## EXPECTATIONS AND CONCERNS OF THE EUROPEAN LANGUAGE INDUSTRY

2018

### PREAMBLE

With 1285 responses from 55 countries, including many outside Europe, this 2018 edition of the European Language Industry survey is the most successful one since its start in 2013.

The 48% increase compared to 2017 is mainly the result of a massive increase of responses from individual language professionals, which allows us to deepen our analysis of the concerns and expectations of this segment of the industry.

This report analyses European trends rather than those in individual countries. Significant differences between countries will be highlighted if the number of answers from those countries is sufficiently high to draw meaningful conclusions.

Table 1 below shows between square brackets the minimum number of responses from companies and individual professionals that has been defined as a reliability threshold for each country. Countries that exceed the threshold are highlighted in green. Countries that are highlighted in yellow are close to the threshold or miss it while still delivering a considerable number of responses. Data from these countries should be analysed with caution.

	Companies	Individuals	Translation Departments	Training institutes	Other
<b>Europe</b>					
<b>Central &amp; Eastern Europe</b>					
Albania	0 [5]	1 [10]			1
Belarus	0 [5]	6 [10]			
Bosnia-Herzegovina	1 [5]	0 [10]			
Bulgaria	6 [5]	9 [10]	1	3	1
Croatia	15 [5]	39 [10]	6		
Czech Republic	7 [5]	16 [10]			1
Hungary	8 [5]	19 [10]	1		1
Moldova	0 [5]	2 [10]			
Poland	12 [5]	14 [10]	1		
Romania	17 [5]	45 [10]	2	5	
Russia	3 [5]	13 [10]			
Serbia	7 [5]	5 [10]			
Slovakia	5 [5]	10 [10]	1	2	
Slovenia	11 [5]	37 [10]	2	1	
Turkey	9 [5]	4 [10]			
Ukraine	2 [5]	3 [10]		3	

2018 Language Industry Survey – Expectations and Concerns of the European Language Industry

	Companies	Individuals	Translation Departments	Training institutes	Other
<b>Northern Europe &amp; Baltics</b>					
Denmark	1 [5]	5 [10]			
Estonia	9 [5]	6 [10]			
Finland	7 [5]	7 [10]		2	
Latvia	6 [5]	8 [10]	2	1	
Lithuania	0 [5]	3 [10]			
Norway	1 [5]	0 [10]			
Sweden	3 [10]	11 [20]			
<b>Western &amp; Southern Europe</b>					
Austria	19 [10]	49 [20]	7	3	
Belgium	13 [10]	15 [20]	2		
France	10 [10]	219 [20]	1		1
Germany	10 [10]	38 [20]	1		
Greece	10 [5]	20 [10]			
Ireland	0 [5]	9 [10]			
Italy	25 [10]	68 [20]	3		1
Luxembourg	0 [5]	0 [10]	4		
Malta	0 [5]	4 [10]	2	2	2
Netherlands	11 [10]	9 [20]	1		
Portugal	14 [10]	31 [20]	4	2	1
Spain	17 [10]	66 [20]	2		
Switzerland	1 [5]	9 [10]			
United Kingdom	32 [10]	82 [20]	1		1
<b>Americas</b>					
Argentina	1 [5]	1 [10]			
Canada	0 [5]	2 [10]			
Mexico	0 [5]	1 [10]			
Peru	0 [5]	0 [10]		1	
United States of America	0 [10]	7 [20]			
Uruguay	0 [5]	1 [10]			
<b>Africa, Asia &amp; Oceania</b>					
Algeria	0 [5]	0 [10]			1
Australia	0 [5]	4 [10]			
India	2 [5]	0 [10]			1
Indonesia	0 [5]	1 [10]			
Israel	0 [5]	1 [10]			
Japan	1 [5]	2 [10]			
Korea	1 [5]	0 [10]			
Morocco	0 [5]	1 [10]			1
South Africa	1 [5]	0 [10]			
Tunisia	0 [5]	1 [10]			
<b>TOTAL</b>	<b>298</b>	<b>905</b>	<b>44</b>	<b>25</b>	<b>13</b>

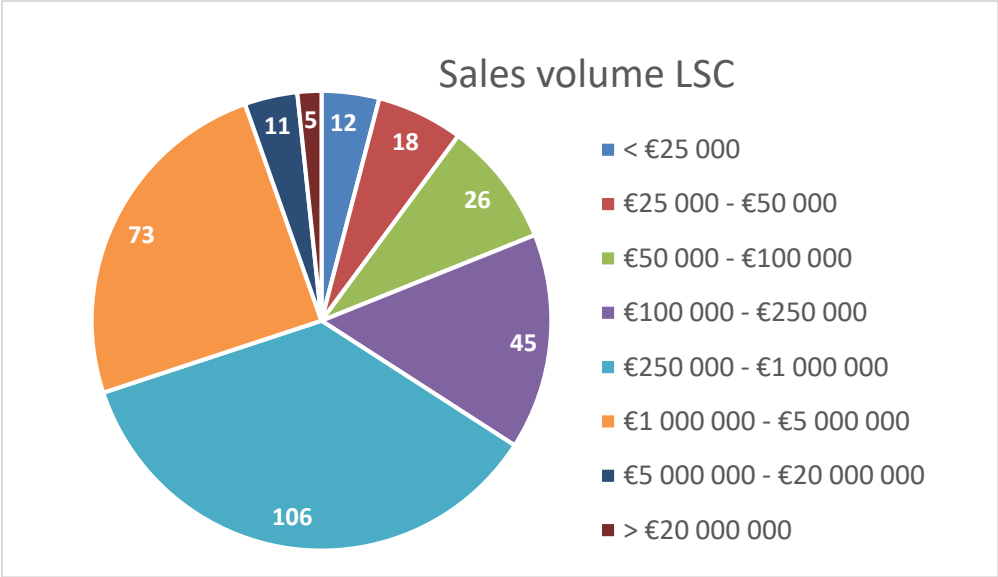
Table 1 – Responses per respondent type and country

## OBJECTIVES

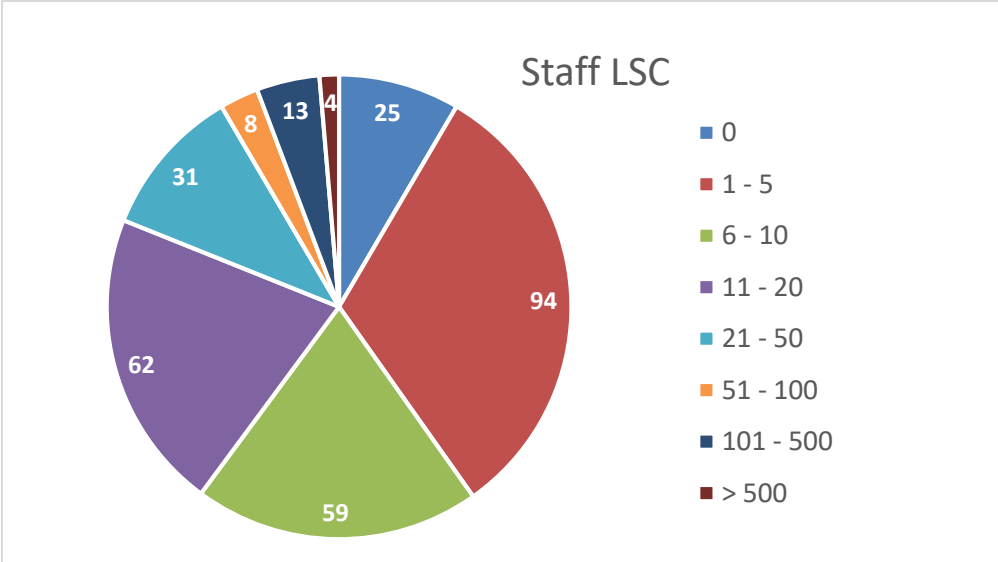
The objectives of the survey have not changed compared to previous editions. It was not set up to gather exact quantitative data but to establish the mood of the industry. As such it does not replace other local, regional or global surveys of the language industry but adds the important dimensions of perception and trust which largely determine the actions of industry stakeholders.

The questions concerning the market as well as the open questions regarding trends and concerns are identical to those in the previous editions in order to detect changes in prevailing opinions.

STRUCTURE OF THE INDUSTRY



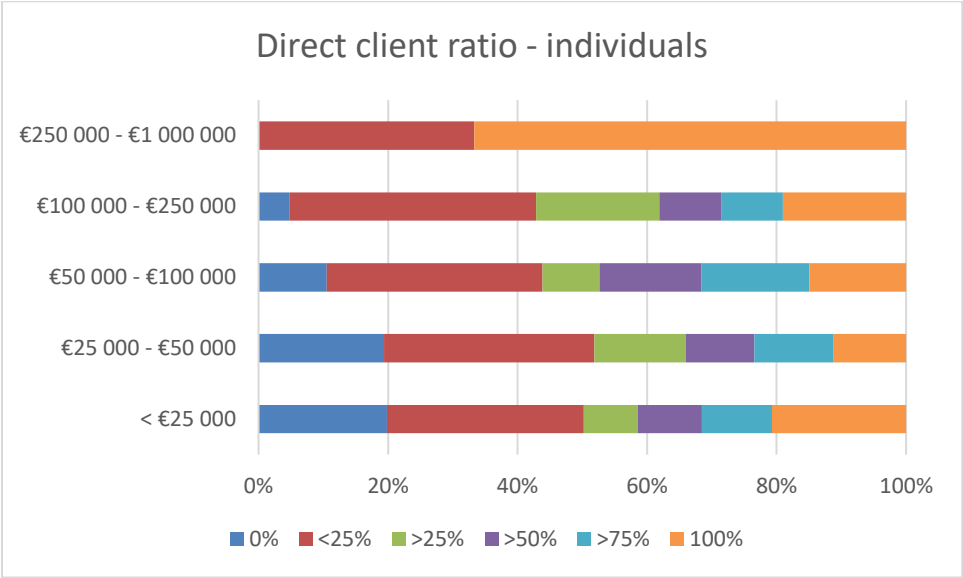
Based on the responses received, most European language service companies (LSCs) can be considered to be small. 34% report a sales figure of less than € 250k. The segment € 250k – € 1m is the strongest one and is back at the level of 2016 with a 36% share. The combined segments over € 1m are less well represented in this year’s survey, with 30% compared to 34% in 2017 and 40% in 2016.



60% of all translation companies report less than 10 employees. This corresponds roughly with the revenue segments up to € 1m.

Among the independent language professionals 50% report an annual revenue of less than € 25k. While this is strongly related to the country from which they operate, this category is still 37% strong in Western and Northern European countries that are considered to have average or above average rate levels. Whether this implies that some are not active full-time or whether

these figures reflect actual revenue figures could not be established. As expected, the impact of rate levels is illustrated by the category between € 50k and € 100k which is 17% strong in the Western and Northern European countries, against 12% for the global average.

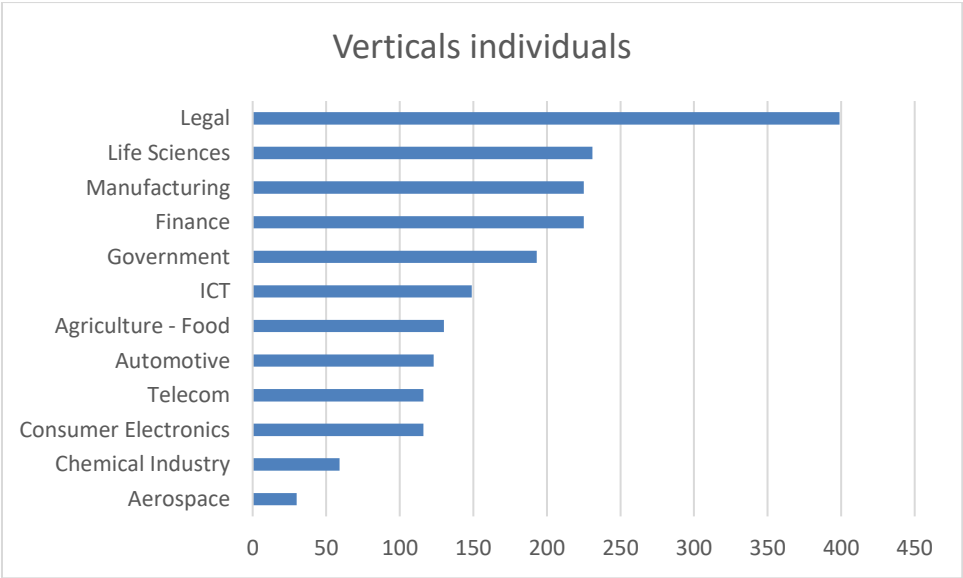
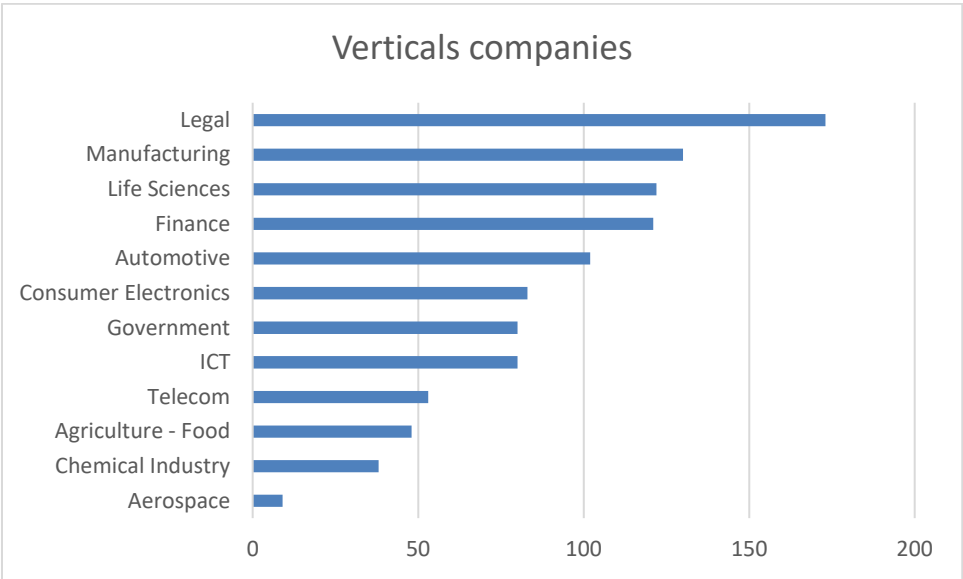


Not surprisingly, the number of individual language professionals that work exclusively as subcontractors decreases with growing revenue. Note however that the zero score of this category in the highest revenue segment cannot be considered reliable due to the very low number of respondents in this segment.

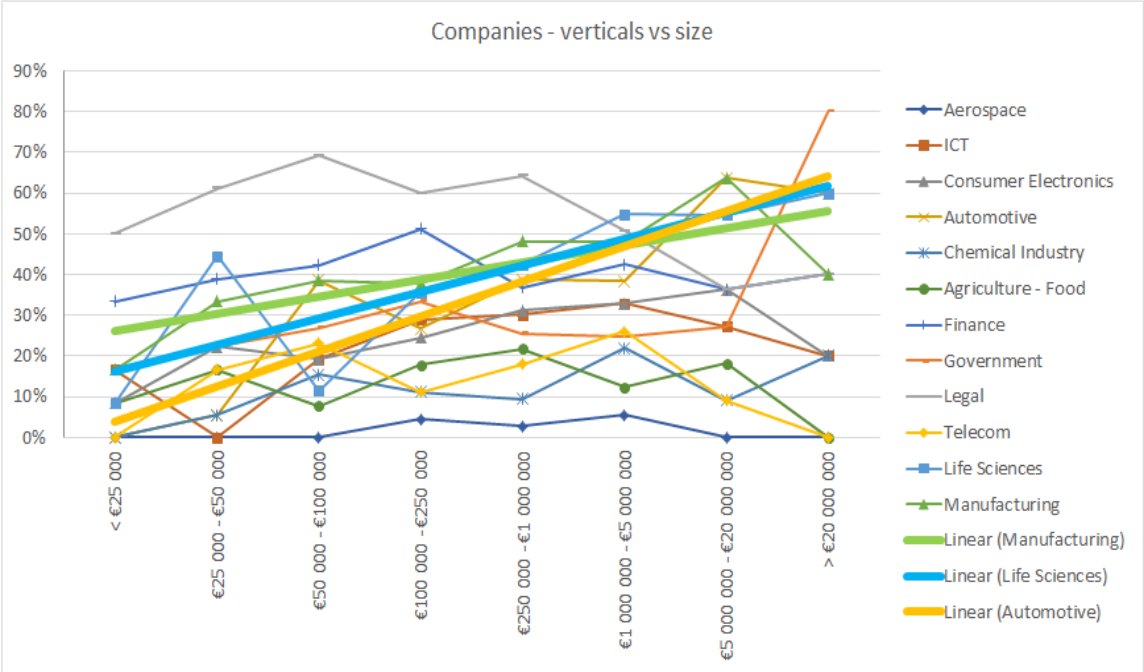
**VERTICALS**

Except for automotive and consumer electronics, which are clearly more popular with language service companies than with independent professionals, both categories of respondents report very similar vertical rankings.

Legal services remain undisputedly the most widely served type of customer for both respondent types. With 399 mentions against 231 for the runner up – life sciences – legal services dwarf the other verticals in the independent professional category. This is most likely linked to the fact that in a number of European countries certified translations can only be performed by individual certified translators.



As in 2017, the results indicate a growing popularity of the high-volume verticals manufacturing, life sciences and automotive with increasing company size, as the respective trendlines in the graph below illustrate. The legal services seem to have a higher impact in the mid-range segments. For the other domains, the tendency is less clear.



Reminder: these rankings show how often the verticals are served by the respondents, but do not necessarily represent their importance in terms of business volume.

MARKET AND DEVELOPMENT

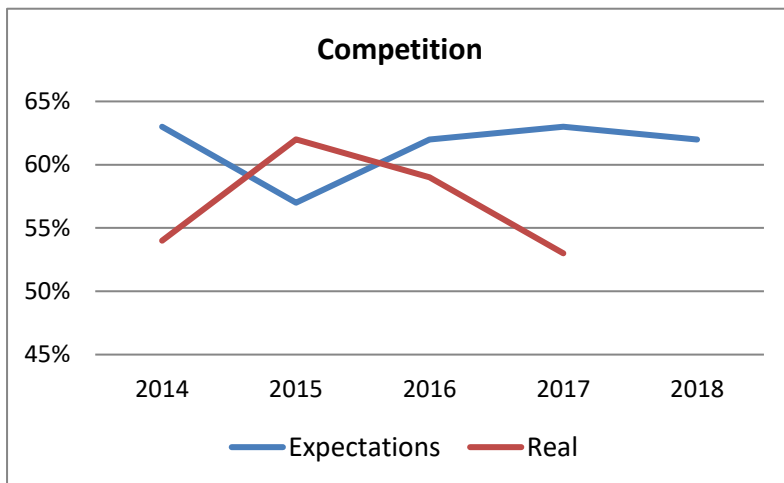
EXPLANATION TO THE GRAPHS IN THIS SECTION OF THE REPORT.

The graphs below showing Real vs Expectations comparisons represent the sentiment of the market by determining the difference between “increase” and “decrease” opinions.

A value of 50% may therefore mean that 60% of the respondents voted “increase” and 10% “decrease”, but it can also mean 70% “increase” and 20% “decrease”.

More significant than the absolute level of the values is the way in which the respondents react to the real values of the past and how they adapt their expectations for the future.

COMPETITION

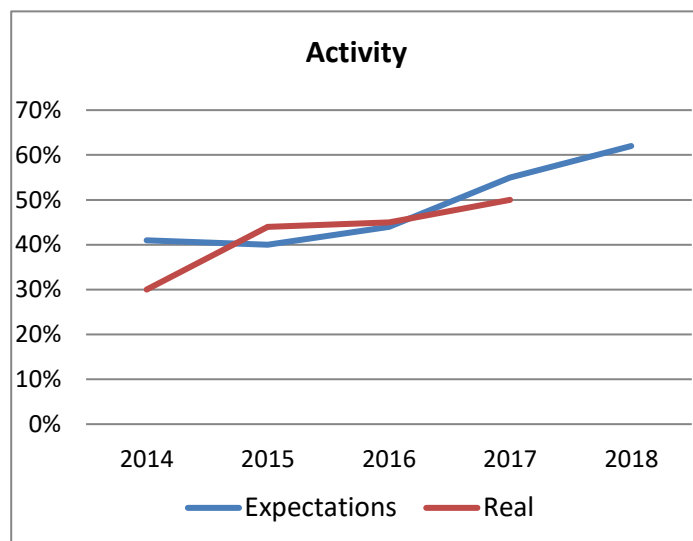


Although companies report that the 2017 increase in competition was not as strong as they had anticipated, the fear for increased competition remains very strong. The expected increase is only marginally lower than in 2017. 63% of the responding companies are expecting an increase in competition.

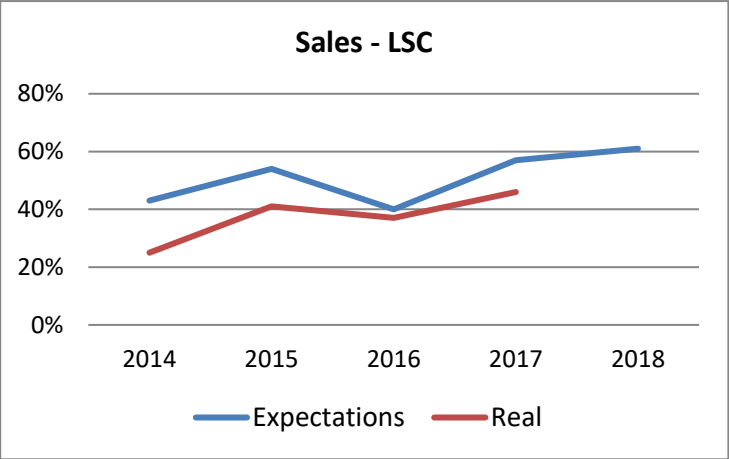
ACTIVITY AND SALES

This year’s results confirm and even reinforce the image of optimism that we already saw in the 2017 edition of this survey, at least what translation activity is concerned.

67% of the responding companies expect an increase in activity, against only 5% a decrease. This is a further improvement compared to 2017, and an obvious sign that the companies expect the actual growth in 2017 to continue.



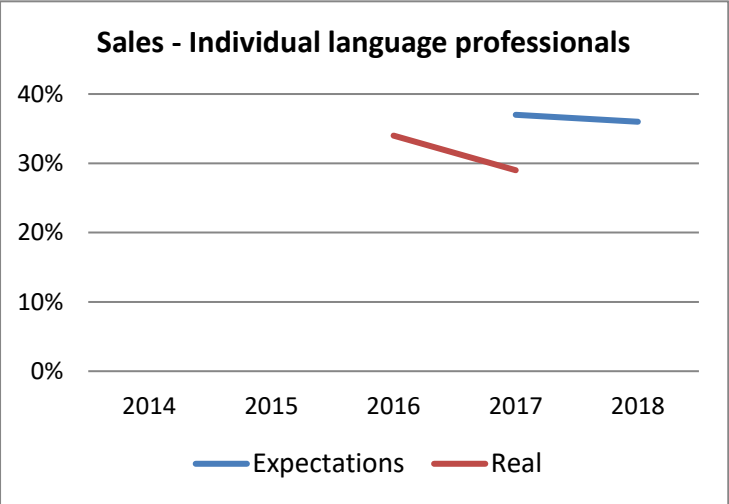




A similar picture can be drawn for the individual sales figures and expectations of the responding companies. 58% reported an increase in sales in 2017 against only 12% a decrease. Consequently, 68% is expecting a further increase in 2018. Only 7% are expecting a decrease.

The situation is somewhat different for the individual language professionals.

In this segment of the industry the actual 2017 results are slightly less positive than those of 2016, with 14% respondents reporting a decrease in sales against only 10% in 2016, while the percentage of those who reported an increase (44%) changed only marginally.

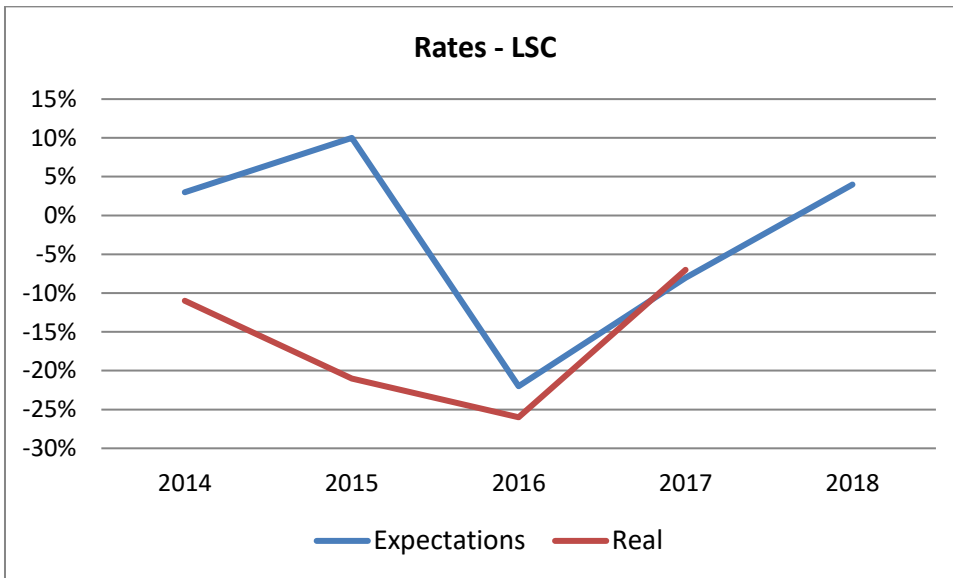


The expectations for 2018 however have not significantly changed compared to those expressed for 2017, with 44% expecting an increase and 8% a decrease.

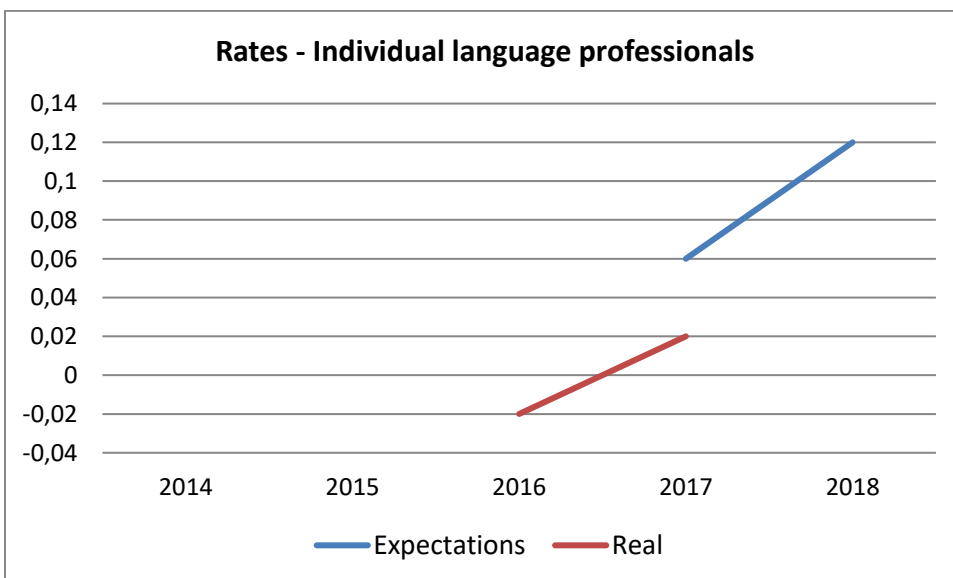
Given that this is only the second year that the results for the individual language professionals are analysed separately, it is too soon to draw any conclusions about trends or about the relationship between expectations and past results.

RATES

While language service companies still expected a marginally negative price evolution early 2017, this expectation has now turned into a very modest positive one. This evolution is undoubtedly fuelled by the less negative price evolution reported for 2017. 23% of the responding companies still report price erosion in 2017, but 17% report an increase in average pricing. This is a considerable improvement compared to the real figures of 2016, with respectively 34% and 8%.

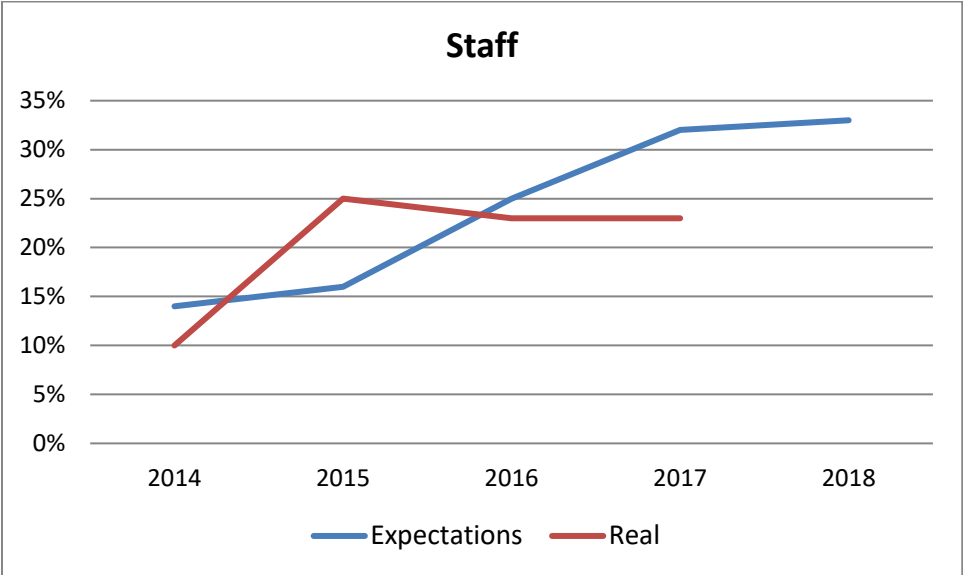


The graph representing the expectations of the independent translators and interpreters, although only based on 2 years of data, shows an almost linear relationship between expectations and real performance in the previous year. The respondents report that the expected 2017 price increase actually happened – although only marginally – and that fuels the expectation that the increase will continue in 2018.



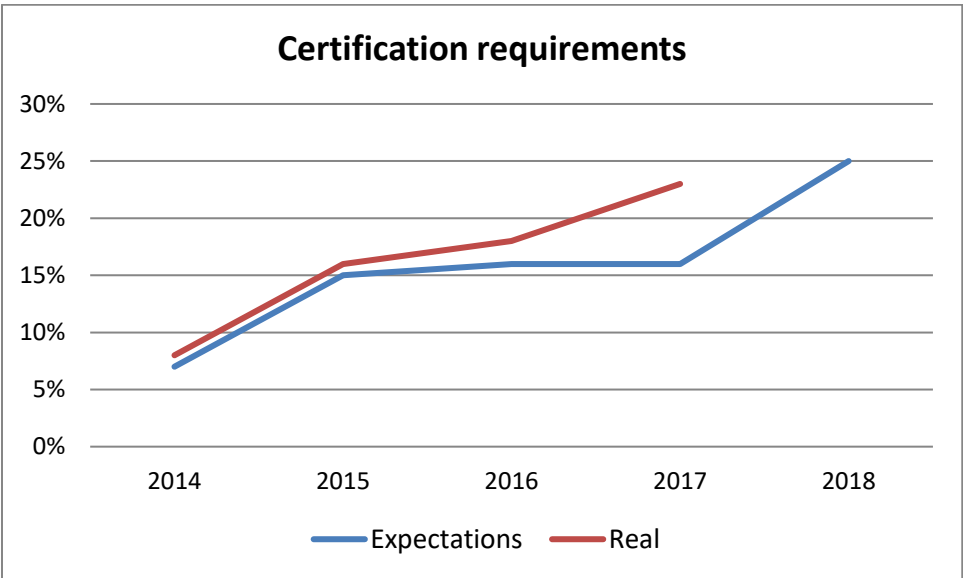
STAFFING

Expected new hiring, possibly the most significant indicator for business optimism, continues its positive trend, although the actual 2017 employment growth that companies reported could not keep up with the steep expectations that they expressed early 2017.



CERTIFICATION REQUIREMENTS

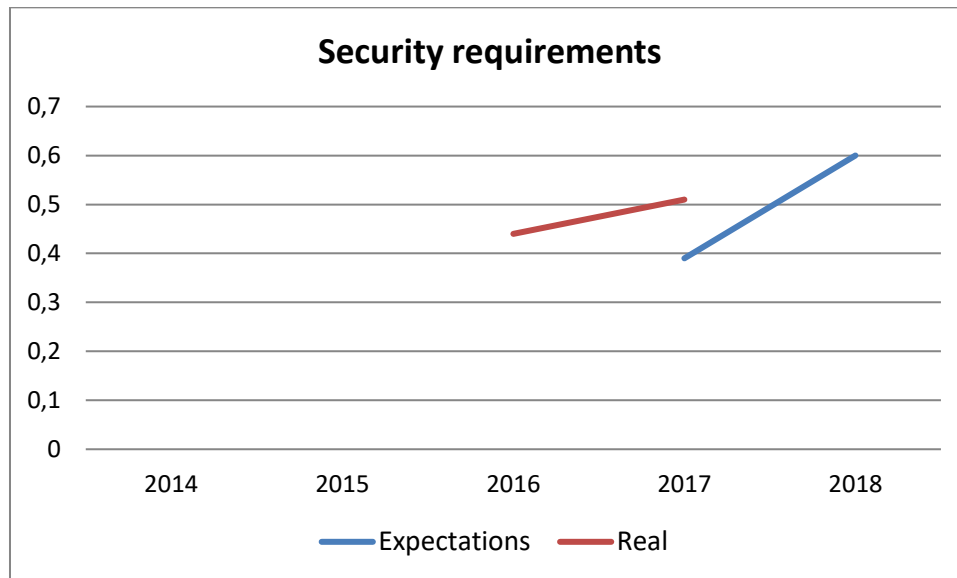
Companies report an increase in certification requirements in 2017 and consequently adjust their expectations for 2018 upward. Although most responding companies expect the requirements to stay at the current level, 25% of them expect an increase. Nobody is expecting a decrease.



## SECURITY REQUIREMENTS

Although this subject was added to the survey only in 2016, we already see the same trend developing as for the certification requirements.

According to the respondents, the real increase in security requirements exceeded even the 2017 expectations, which led them to further increase their expectations for 2018.



## INVESTMENT, DISINVESTMENT AND CERTIFICATION PLANS

The optimistic views that speak from the answers regarding the market evolution are also reflected in those about investment and disinvestment plans.

54% of all responding companies report that they have investment plans, with 40% wanting to realize those plans in 2018. Only 7% report disinvestment plans.

Certification plans are slowly reaching their ceiling. 48% of the responding companies selected “not applicable” which in this context means that they are already certified. Of the remaining 52%, 24% plan to certify (13% in 2018) and 26% have no certification plans.

Overall the investment sentiment looks very positive throughout Europe. Even Austria, where the reported sentiment had been degrading over the last few years, is back in a positive mood with 44% of the responding companies reporting investment plans and none report plans to disinvest.

Belgium and the United Kingdom show a somewhat atypical situation with a relatively high number of reported disinvestment plans compared to other countries. Whether this is linked to higher M&A activity in these countries or other reasons could not be reliably established.

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	Invest	Disinvest	Certify	Sentiment	2015	2016	2017	2018
Austria	12	0	18	12				
Belgium	11	3	2	8				
Croatia	10	2	3	8				
France	11	0	5	11				
Germany	8	0	4	8				
Italy	23	3	6	20				
Netherlands	15	1	2	14				
Poland	12	0	4	12				
Portugal	12	0	5	12				
Romania	14	2	7	12				
Slovenia	15	0	4	15				
Spain	14	1	5	13				
United Kingdom	25	9	16	16				
	14	2	6	12				

Note:

The sentiment analysis has changed in this edition of the survey. In previous years, the survey differentiated between national and international expansion, and disinvestment with or without continued involvement.

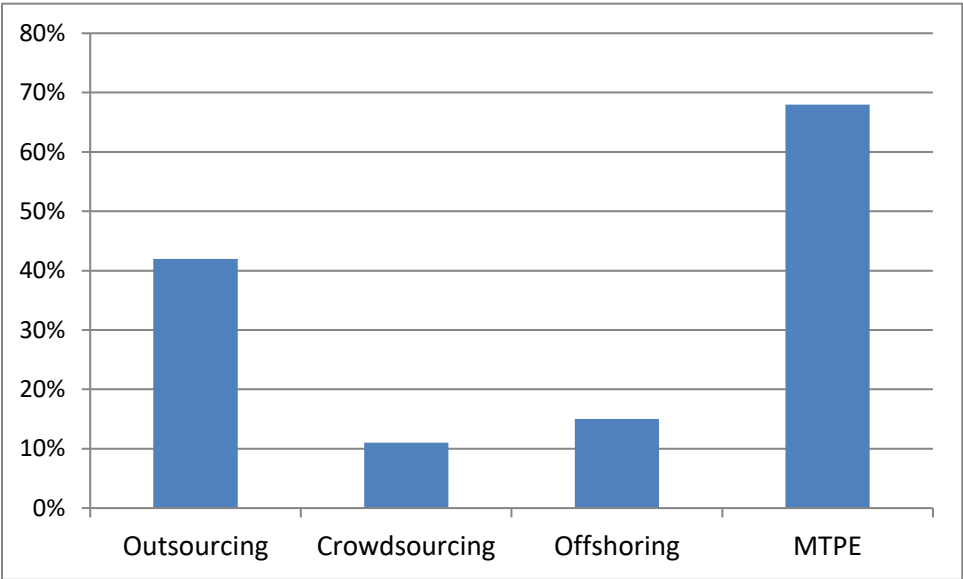
In this edition, the differentiation is based on the concreteness of the plans, distinguishing between plans for 2018 and plans for 2019 and beyond. The more concrete plans are weighted twice as high as the less concrete ones.

**OPERATIONAL PRACTICES**

Outsourcing remains a popular practice among language service companies, with 40% indicating that they want to increase this practice. Only 2% report a decrease.

Even more popular is MT post-editing this year. 37% report an increase and an additional 17% indicate that they are starting this practice.

Crowdsourcing and offshoring, both often debated in language industry forums, remain slow starters. This year 5% of the companies report to start with crowdsourcing and 4% to increase their use of this practice. Offshoring has already a slightly higher penetration and 11% of the companies report to increase this practice, compared to 5% in 2017. An additional 3% want to start with the practice.

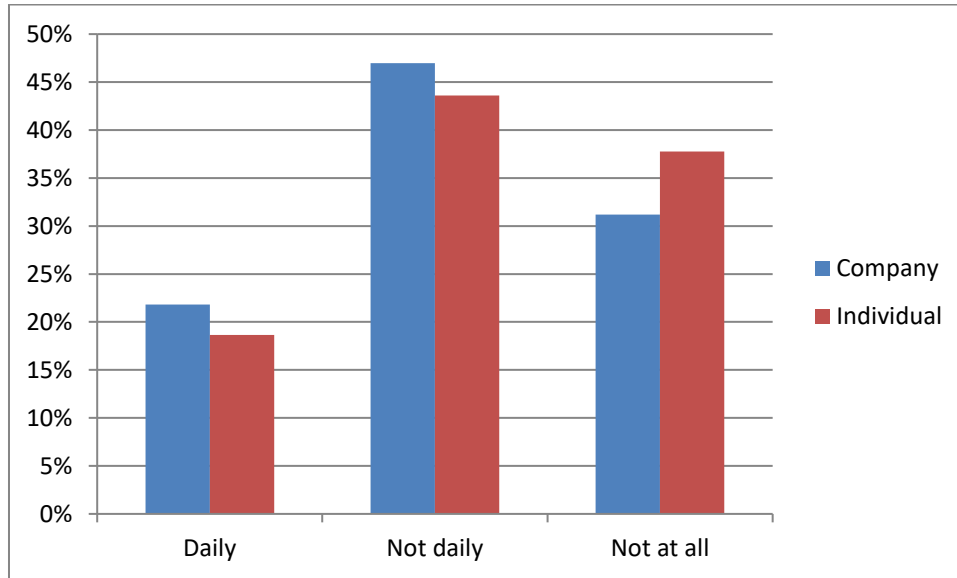


*Note:* the graph above does not represent actual usage of the practices, but the level of their expected development, determined as follows: [start \* 2] + [increase] – [stop \* 2] – [decrease].

TECHNOLOGY

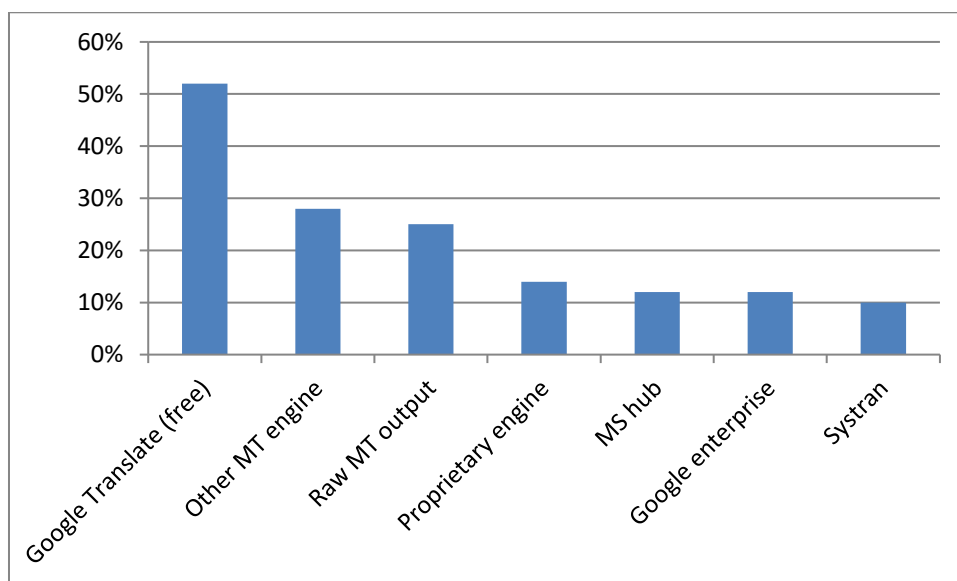
MACHINE TRANSLATION

We will remember 2018 as the year in which more than 50% of both the companies and the individual language professionals reported that they are using MT in one form or another.



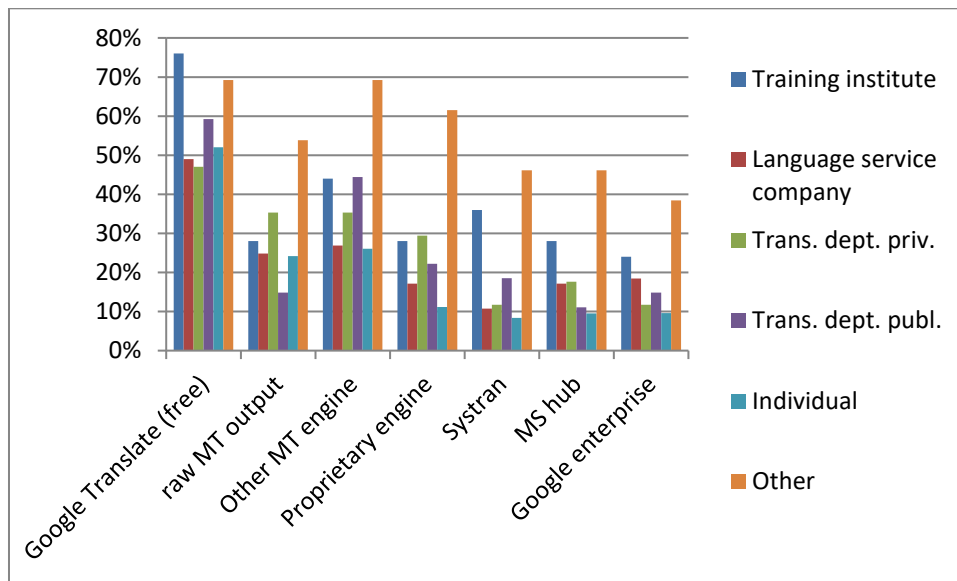
The technology cannot yet be considered mainstream, because only 22% of the LSC’s and 19% of the individuals state that they are using it daily, but the number of companies and individuals that are not using it at all has dropped to respectively 31% and 38%.

This does not mean that MT users are enthusiastically embracing the technology, as the answers in the section about negative trends testify, but it is a strong indication that the market has accepted that machine translation is here to stay.



The survey results also show that using MT does not necessarily mean investing in MT. The most popular engine is still the free Google Translate. 52% of all respondents report that they are using the site, but we see a clear difference between the various categories of respondents. While more than 70% of the respondents in training institutes report that they are using the site, only 49% of the translation companies and 52% of the individual translators state the same.

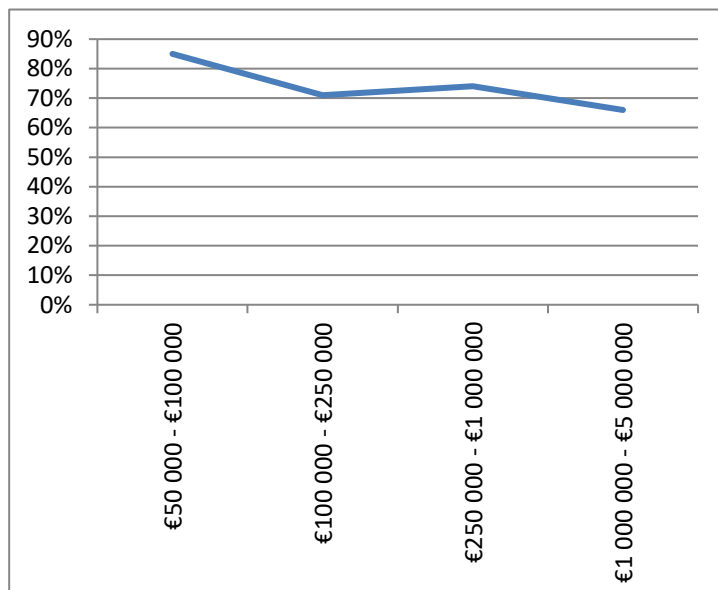
Engines that require financial or time investment have difficulty to attract more than minority interest. Individually they all remain under the 15% usage mark, but the combined ‘other’ engines score approx. 25% which is a clear increase compared to 2017. This group of engines includes primarily open source engines that are proposed by specialized companies such as Kantan, Tilde and since recently DeepL.



The neural MT breakthrough has visibly come too late to already show a dramatic impact on the willingness of companies or independent language professionals to invest in the technology and operate their own MT engine. We expect that change, if it happens, to be visible in next year’s survey results.

The direct correlation between MT usage and company size which was visible in the 2017 results is not apparent in this year’s results. If anything, this year we see the opposite trend, at least in the size segments that are strongest represented in the survey.

We therefore cannot confirm the existence of any correlation between company size and MT usage





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## CAT AND TERMINOLOGY TOOLS

This year's results confirm the 2017 statement that the use of CAT tools is clearly more widespread in language service companies than in the individual professionals' community. Less than 1% of the companies report that they are not using CAT tools, compared to 13% of the individual language professionals.

This year the survey tried to ascertain the level of competition on the CAT market.

The survey results indicate that this CAT landscape is becoming more complex, but they also show that the SDL/TRADOS product suite still has a leading position in terms of installed base, with 67% of the respondents using one or more versions of the product (ranging from 56% of the training institutes to 79% of the translation companies).

It is rarely the only tool used by translation companies and independent translators, but even when considering the combined CAT tool usage, it continues to hold the pole position, with 30% of weighted usage (taking into account the reported frequency of usage).

MemoQ can currently be considered as the most serious contender, with approx. 40% penetration. The top 5 is completed with Memsource, Wordfast and Across, which all remain below the 30% installed base mark.

Although several CAT tools clearly have a national or regional sales focus, the survey results indicate that this is not enough to be successful on the domestic market. A clear exception to this rule is MemoQ, which is a clear market leader in its home country Hungary with a penetration of 79%.

Not surprisingly, Multiterm (the terminology tool linked with the SDL/Trados suite) is the most popular terminology tool around – except for the basic Office-type tools that are used 50% more often than Multiterm, which itself is used 6 times more often than the next in line.

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## CAT USER RIGHTS AND OWNERSHIP

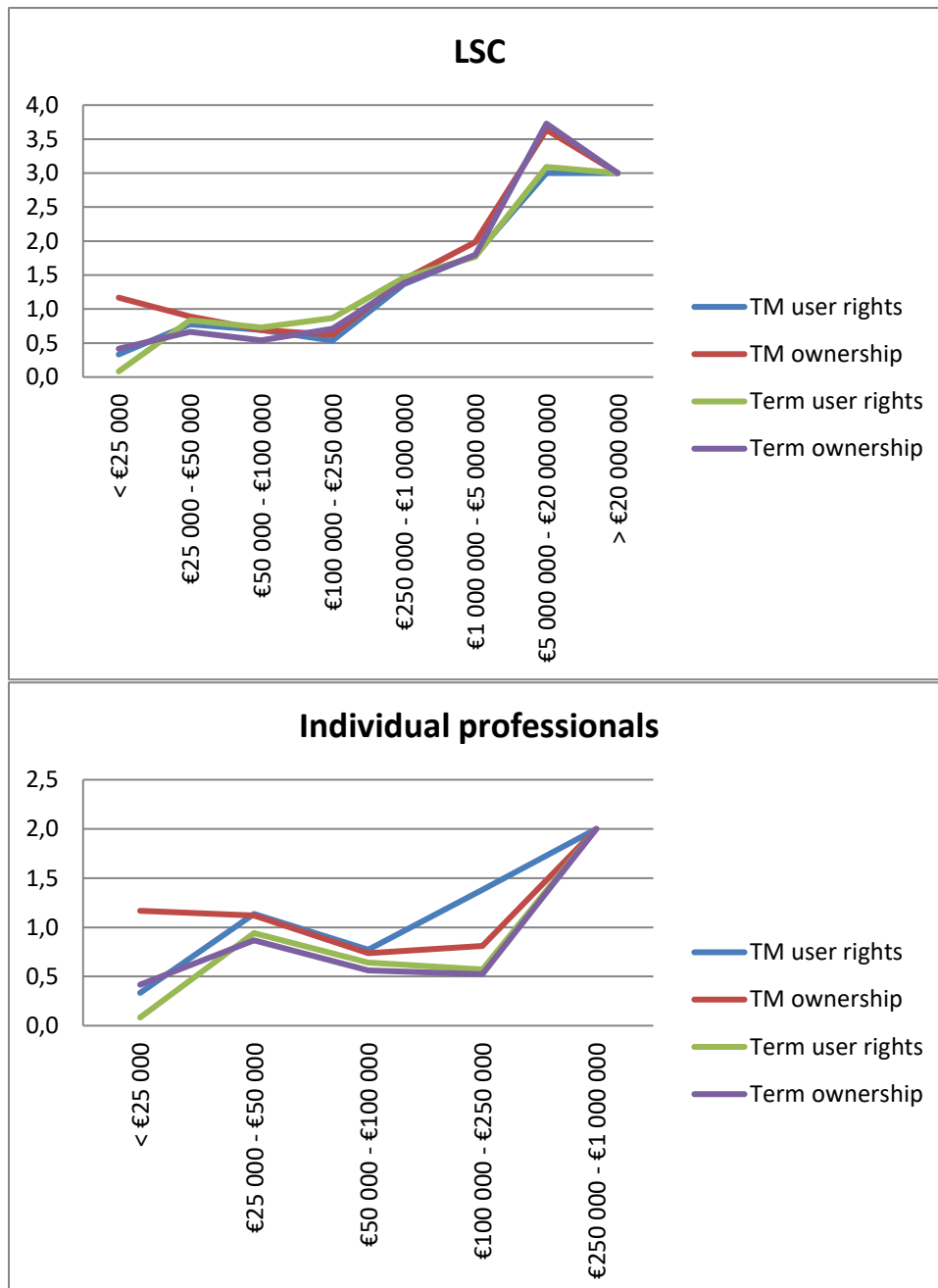
The transfer of user rights and ownership of language assets such as translation memories continues to be a hotly debated subject in the language industry. For language service companies and individual professionals alike, this is a sensitive area.

Today's global business relationships give rise to conflicts between European and Anglo-Saxon intellectual property rules.

As in 2017, the results of the survey reflect this reality. In both groups – LSC's and individual professionals – we see that the transfer of user rights or ownership is more common as the business volume increases. This is probably due to the impact of international business and larger customers who require this transfer. This trend is particularly visible among the larger companies. In the size segments above € 1M, we see a steep increase of rights transfer.

Companies and individuals of the same size segment report comparable transfer levels.

In the graphs below, the 0 level stands for no transfer at all, and 4 stands for 100% transfer.



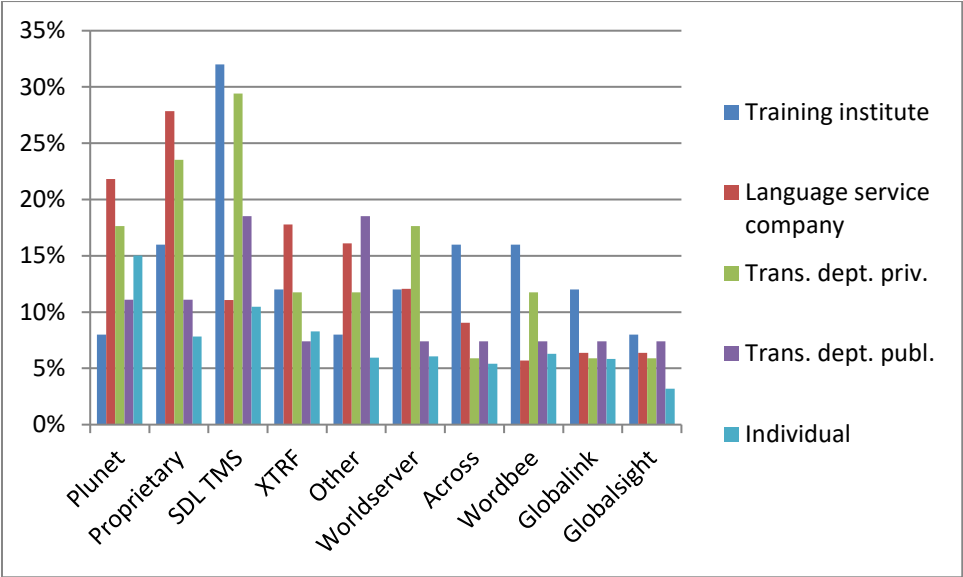
## TRANSLATION MANAGEMENT SYSTEMS

The level of penetration of translation management systems in language service companies has not significantly changed compared to 2017, with 76% of the responding companies using some type of management system. This is, not surprisingly, significantly more than the 34% of the independent professionals and the 48% of the translation departments.

The popularity of the various systems available also differs widely depending on the type of respondent.

This year’s results confirm that language service companies tend to prefer home-grown systems. The most popular 3rd party system in this category is Plunet, followed by XTRF. SDLTMS on the

other hand seems to be more often selected by training institutes and translation departments. The independent professionals most often mention Plunet as the system they are using.



OTHER TECHNOLOGIES

Besides the language technologies treated above, only Optical Character Recognition (OCR) and, to a lesser degree, subtitling technology are reported to be used fairly frequently, with OCR being used almost weekly on average.

Voice recognition (dictation) ranks 3<sup>rd</sup> for both the companies and the individual professionals, but it is clearly more popular with the individuals than with the companies.

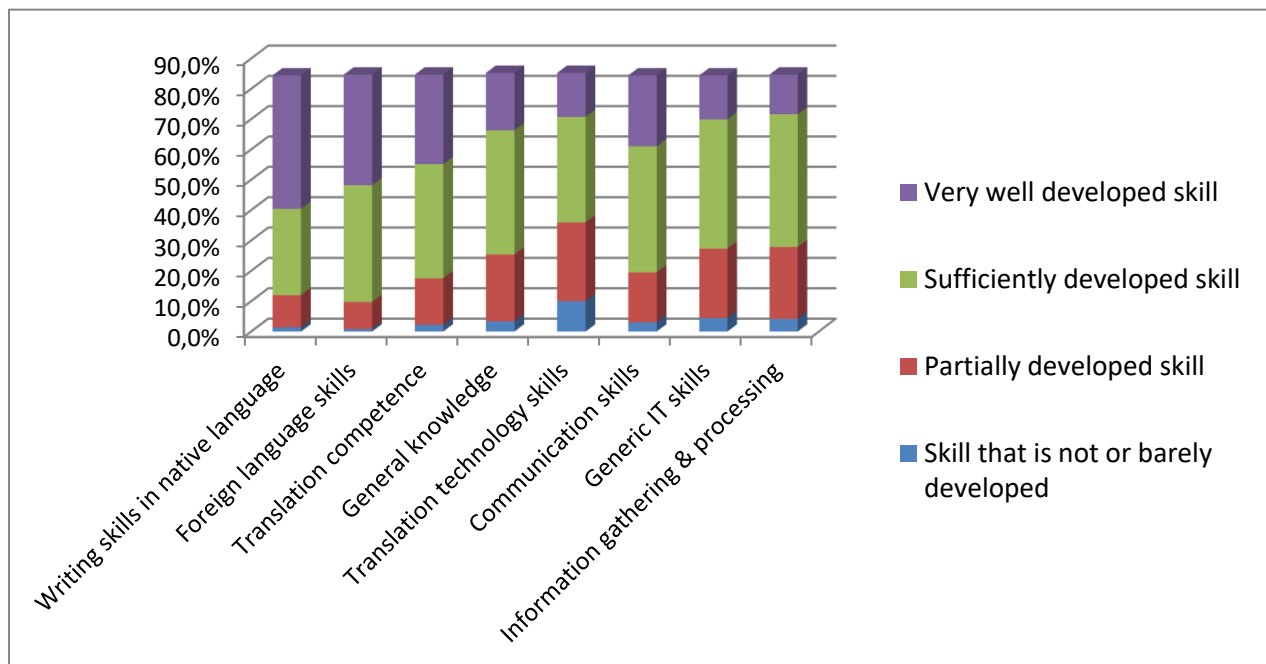
RECRUITMENT AND TRAINING

SKILL LEVEL OF NEW MASTER-LEVEL GRADUATES

The results below refer to training institutes, translation companies and translation departments (359 respondents).

A majority of these respondents rate all skills of new graduates as either sufficiently developed or very well developed. Translation tool skills score lowest, despite the stronger cooperation between universities and translation professionals, and the efforts made by translation tool providers.

10 to 15% used the “not applicable” answer, which indicates that the person who completed the survey is not involved in recruitment and therefore was not comfortable giving an opinion.



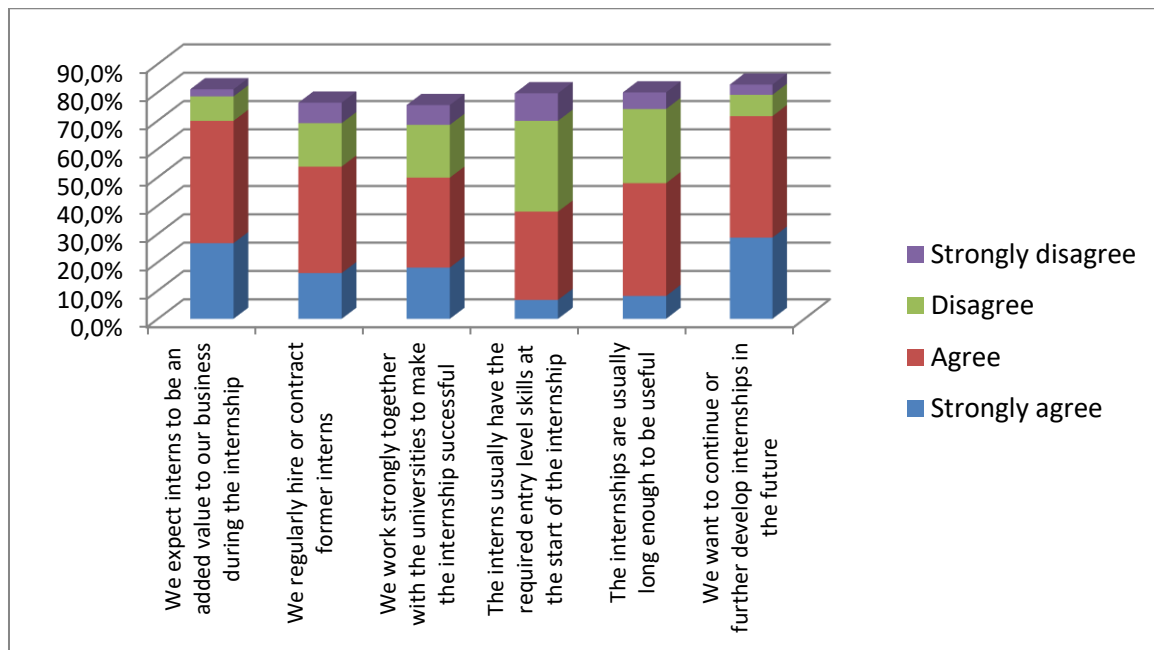
INTERNSHIPS

In 2018 the survey included for the first time a series of questions on internships, a practice that is widely considered as an excellent means to narrow the gap between university and profession. 285 companies, training institutes and translation departments provided information on this subject.

Again, quite a high percentage (19%) of these respondents answered “not applicable”. Approx. 50% of these did however answer the questions about graduate skills. It is therefore reasonable to assume that these organisations do not have experience with internships. The graphs below do not show the “not applicable” category.

The results show in general a rather positive view on internships. Of those respondents who provided a reply, about 86% expect interns to be an added value. It is therefore not surprising that 87% want to continue or further develop internships in the future.

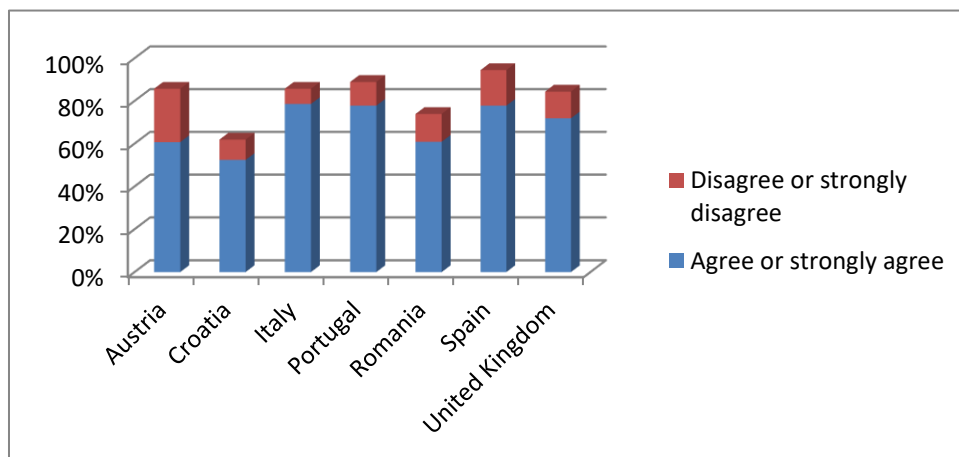
A little less positive were respondents on the skills of the interns and on the duration of the internships. Only 48% agreed that the interns usually have the required entry level skills at the start of the internship and 60% considered the internships are usually long enough to be useful.



A country-specific analysis, limited to the 7 countries that delivered at least 15 answers to these questions, reveals some interesting patterns.

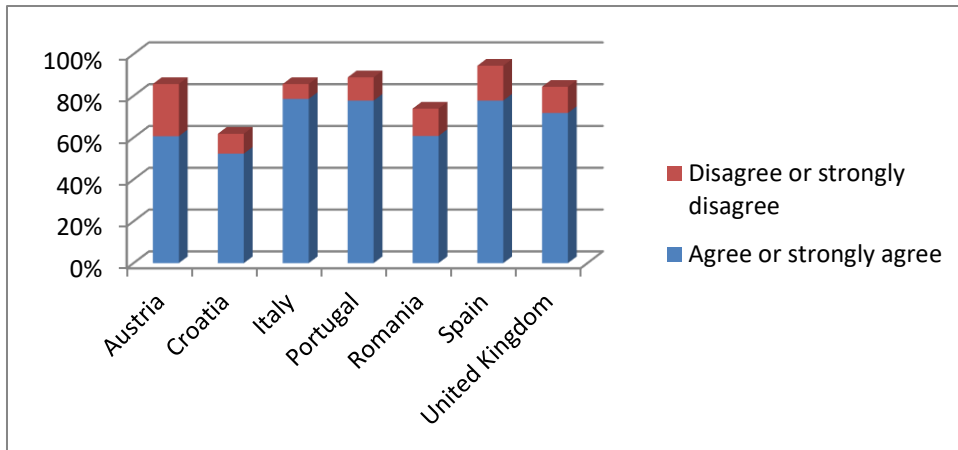
**Added value**

Except for Austria, where 25% of the respondents disagree, in all these countries a strong majority of the respondents (“not applicable” not considered) agree that internships need to be an added value to the organisation already during the internship.



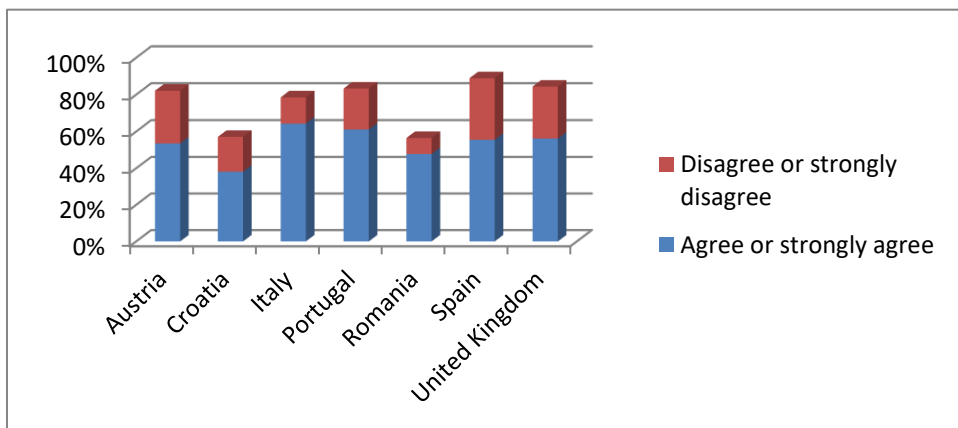
**Future**

A similar pattern appears with regards to the future continuation or development of the internship practice.



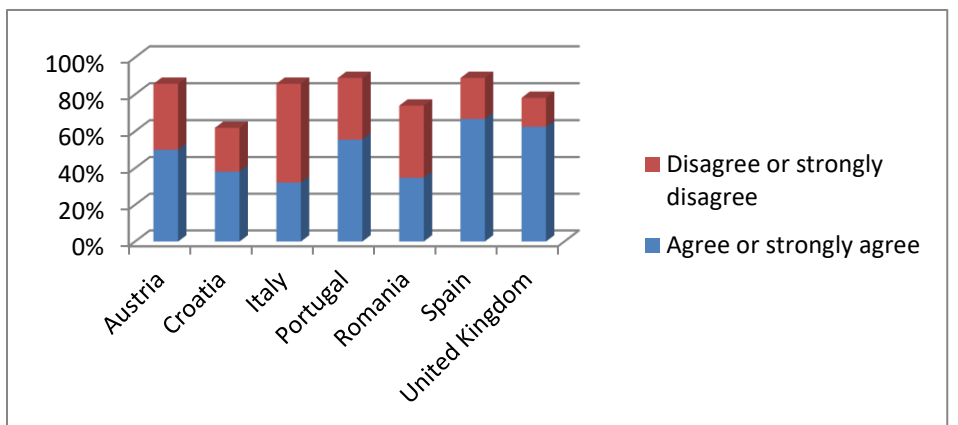
**Hiring**

Hiring practices show stronger differences between the countries, with Italy and Romania showing a much stronger tendency to hire or contract former interns than the other countries



**Duration**

The question about the appropriateness of the internship duration revealed the strongest differences between the individual countries. While a clear majority of British respondents were very positive about the duration of the internships (63% positive and only 16% negative), Italy shows an almost opposite situation, with 54% negative answers against 32% positive ones.

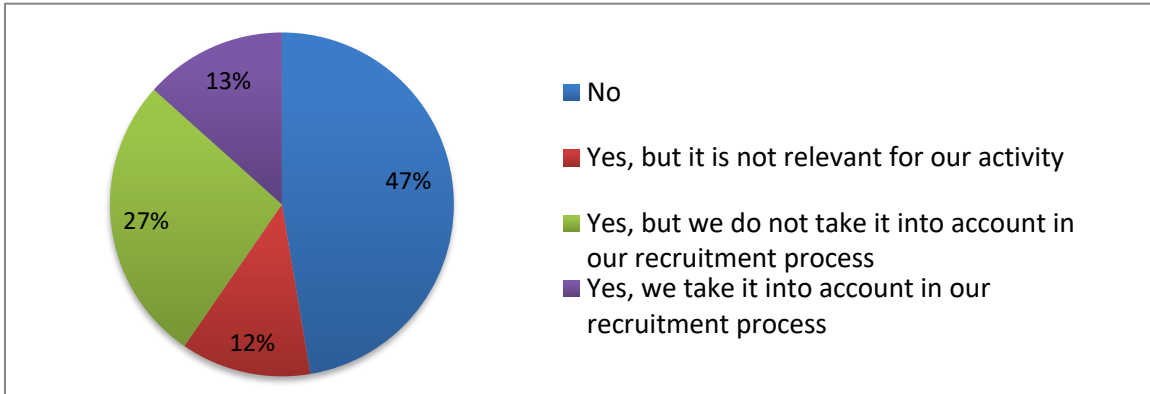


These results will undoubtedly be useful input for the internship discussions within the framework of the EMT university network.

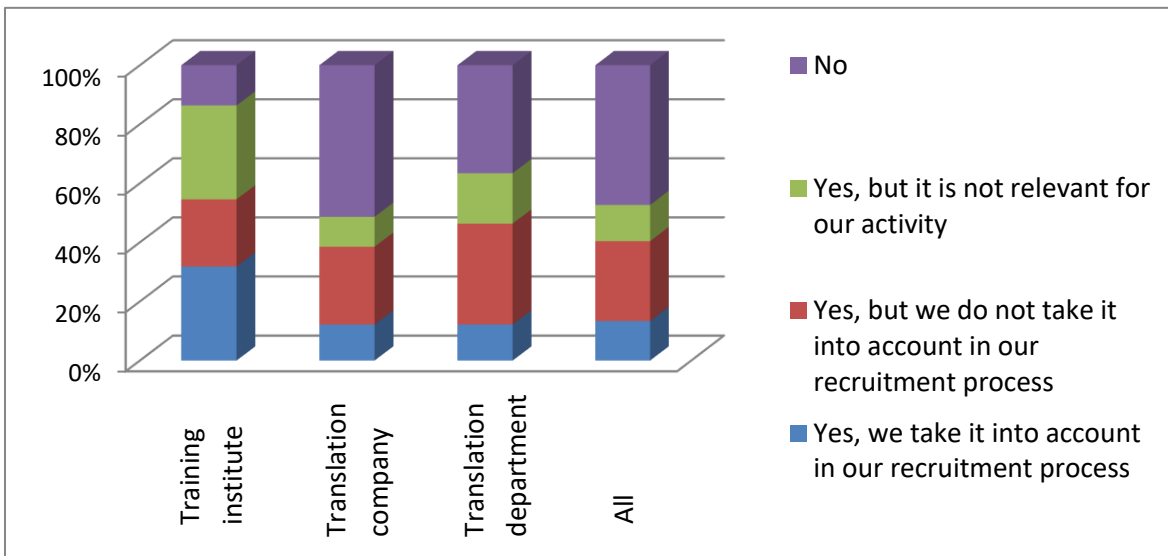
EUROPEAN MASTER’S IN TRANSLATION (EMT)

The graph strongly resembles the one in the 2017 edition of the survey, but we do see a modest increase in awareness. While 54% of the respondents were not aware of the EMT label in 2017, that percentage has dropped to 47% in this year’s survey.

A less positive finding is that the percentage of respondents that take it into account in their recruitment process has not changed. It is still only 13%.



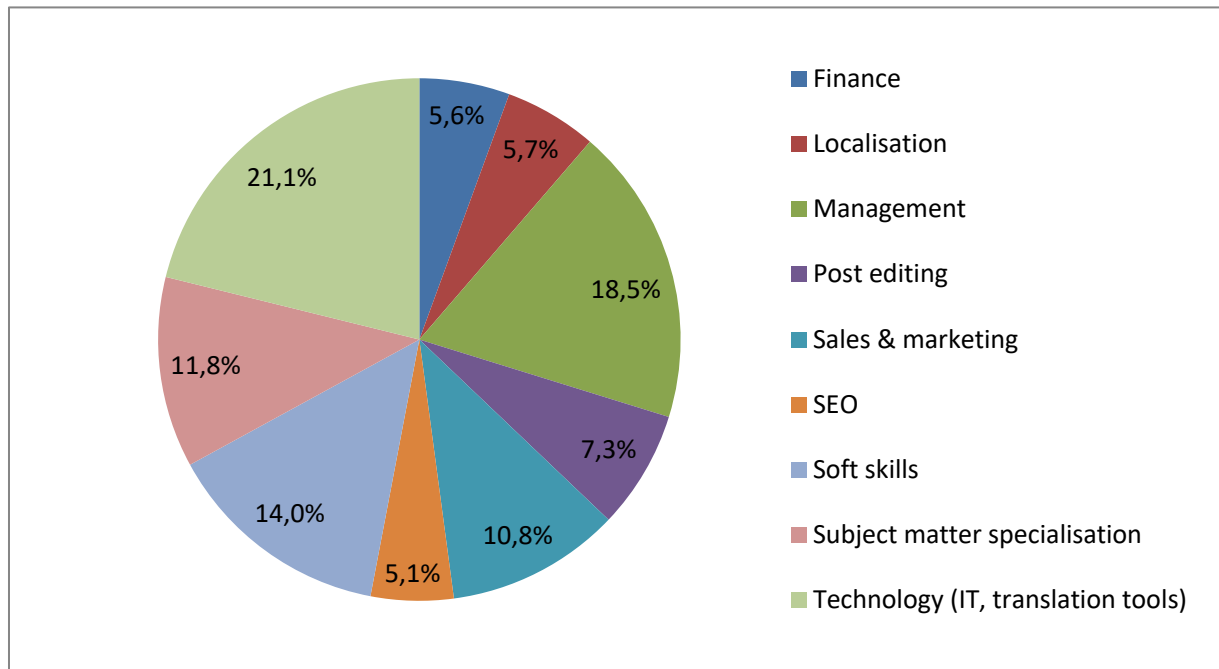
Even though the number of respondents from training institutes (22) and translation departments (41) is not very high, the following breakdown could be considered:



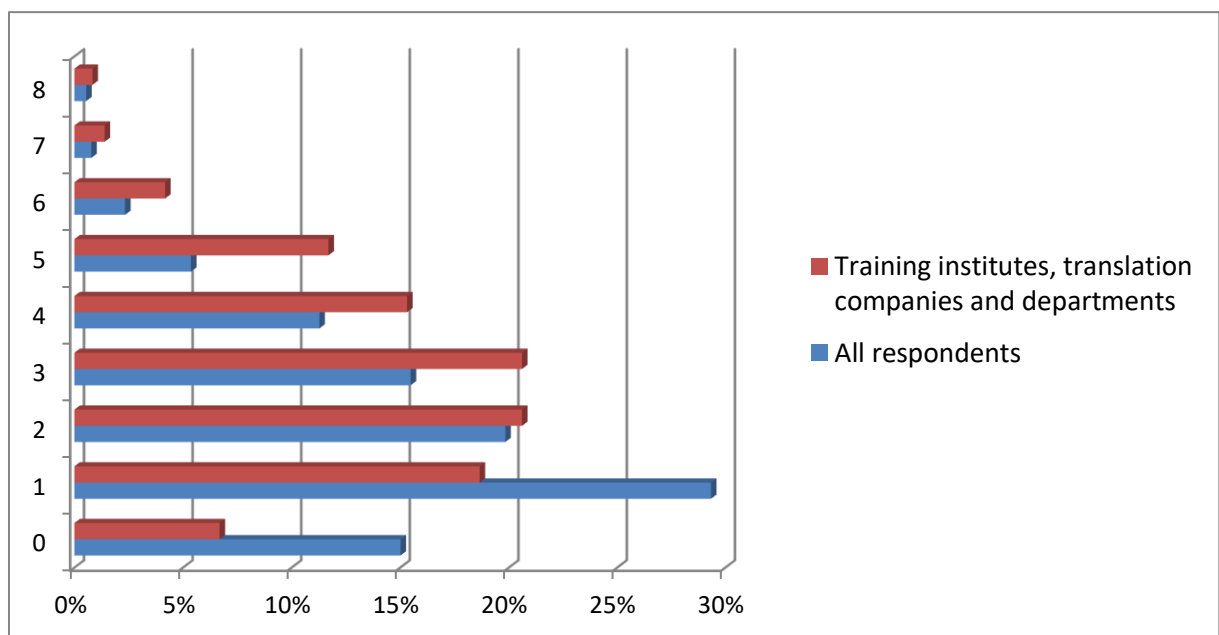
INVESTMENT IN TRAINING OR PROFESSIONAL DEVELOPMENT

WHICH TYPES OF TRAINING HAVE YOU ORGANISED OR ATTENDED IN 2017?

The following chart presents the popularity of the various types of training across all respondent types.



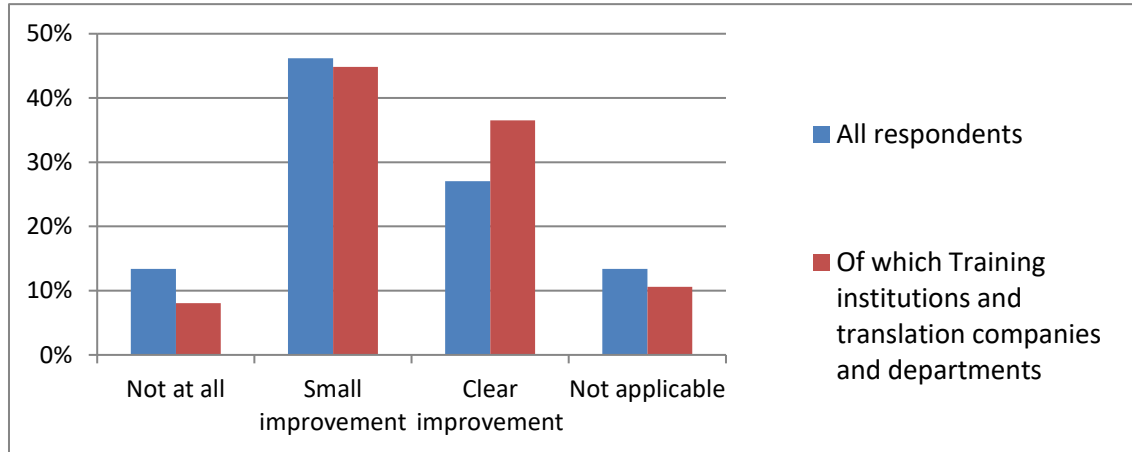
Not surprisingly, the respondents representing training institutes, translation companies and translation departments report a higher than average number of trainings organised or followed. Given the importance of lifelong learning, the 15% respondents that did not organise or follow any training in 2017 can – and should – be considered as a wakeup call for the industry at large.





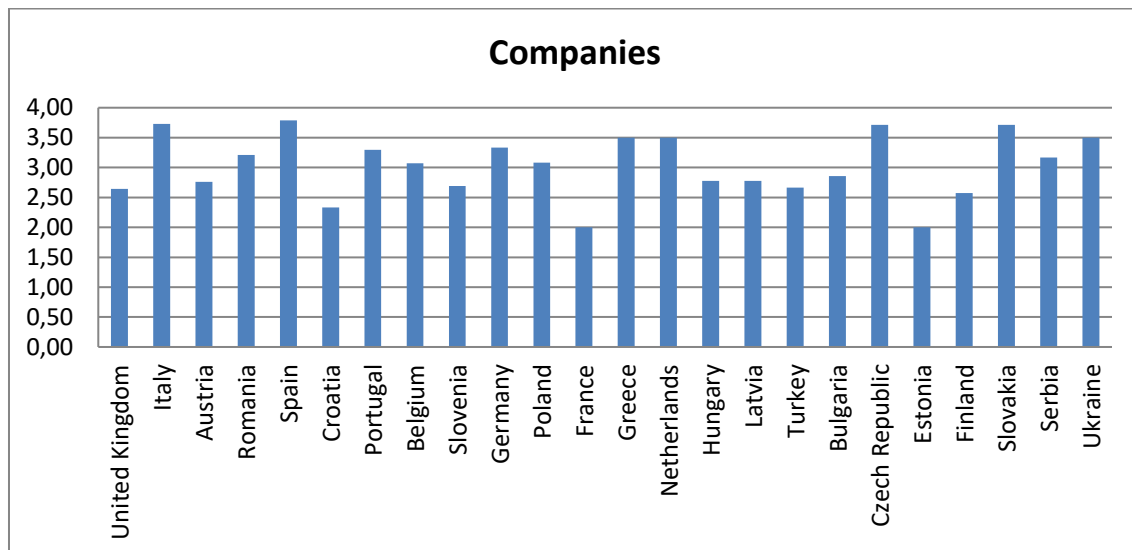
RETURN ON INVESTMENT

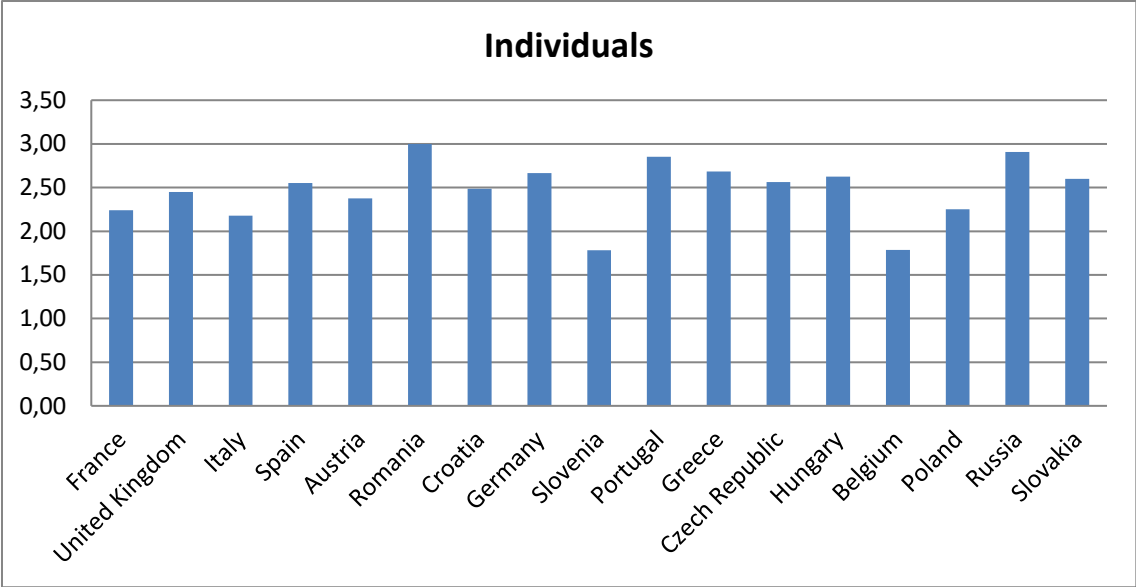
Training institutions, translation companies and translation departments report a considerably higher impact of training on their performance than the individual professionals, which make up most of the respondents.



The high percentage of *Not Applicable* answers from translation departments (43%) indicates that these departments have difficulty in estimating the return of investment of their efforts.

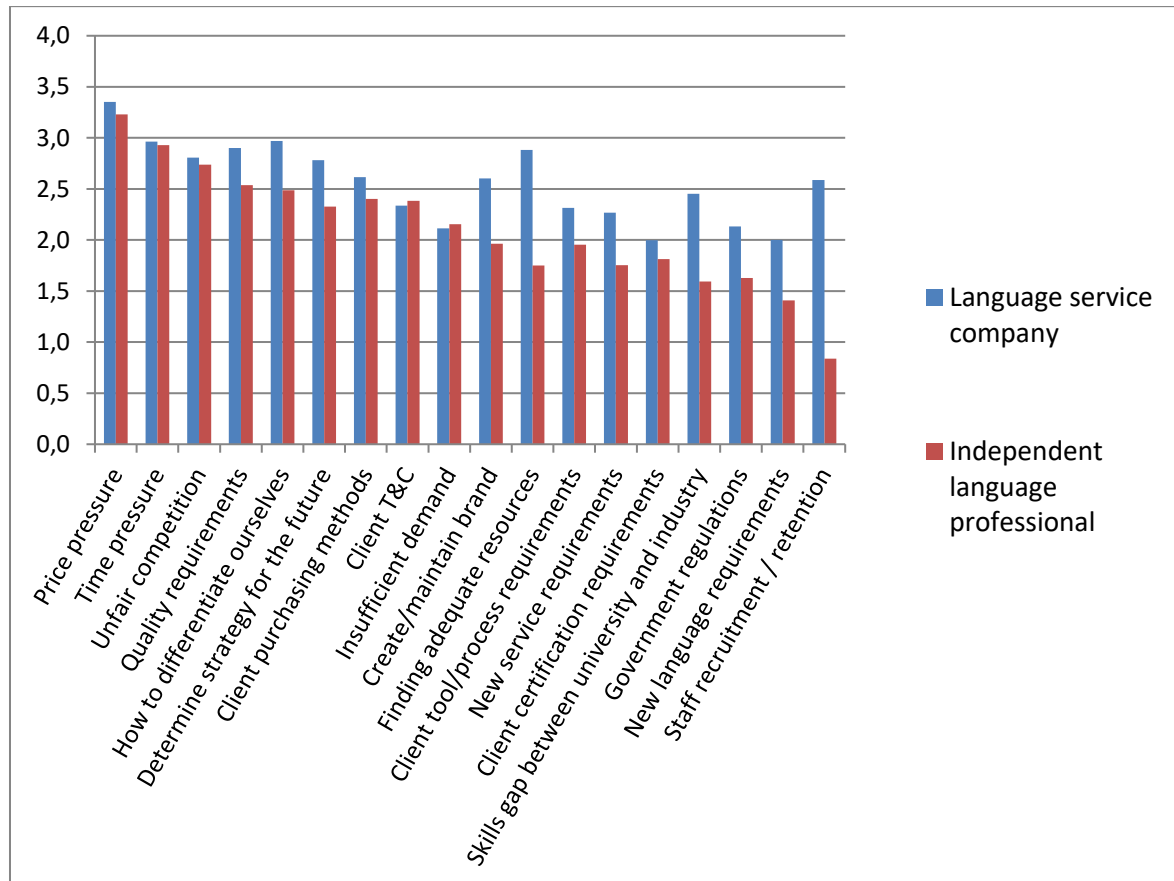
The analysis per country gives different results for individual professionals and companies. In all countries, except France and Croatia, companies score consistently higher than individuals. The two charts below show countries with 10 or more responses of the respective respondent category.





## CHALLENGES

With a score of 3.1 out of 4, price pressure remains the undisputed number one challenge, as it has always been since the start of the survey in 2013, even though the answers regarding price evolution did not indicate a fear of further decline anymore.



Except for “client terms and conditions” and “insufficient demand”, language service companies score all challenges higher than individual professionals.

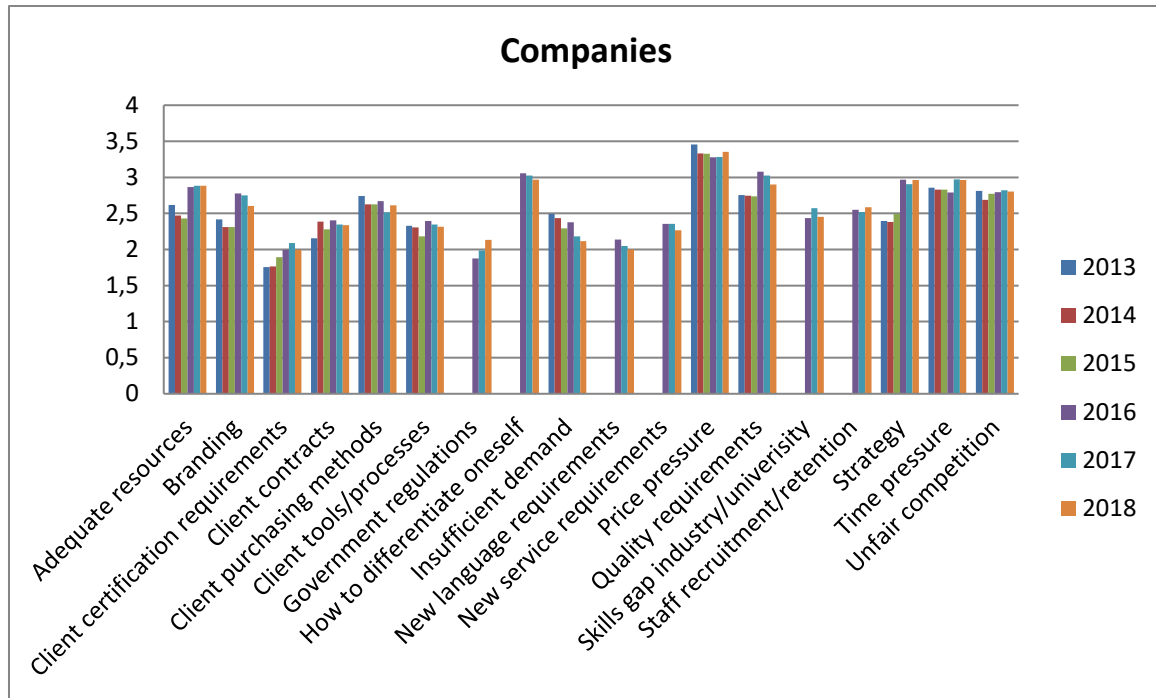
The aspects related to strategy and positioning such as branding and differentiation, which were added to the analysis in 2016, continue to score high among language service companies but a lot less among the independent professionals. In general, we see the logical differences between companies and independent professionals clearly reflected in the reported challenges.

Independent professionals are a lot less concerned about staff related issues, new language requirements or finding adequate resources.

As in 2017, independent language professionals are also significantly less negative about the skills gap between universities and industry than the companies.

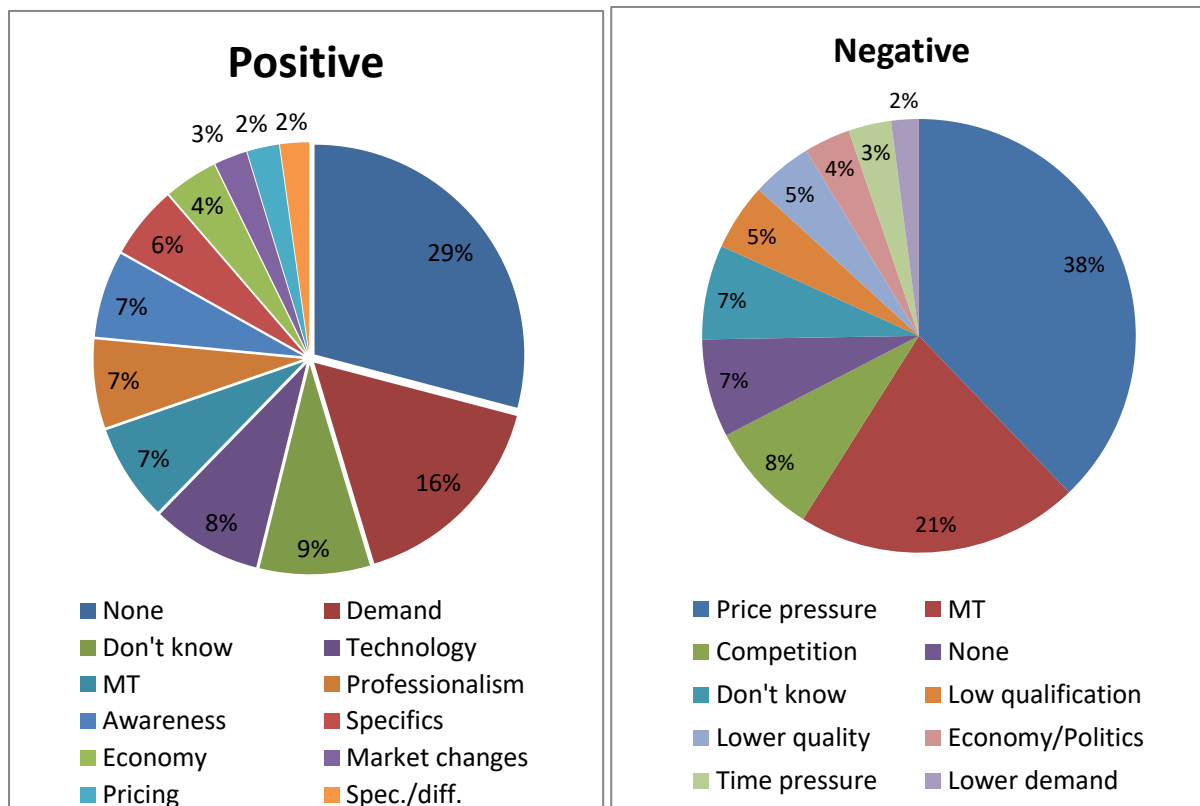
Government regulations, introduced in 2016, are now seen as a challenge by more than 50% of the respondents, but they are still considered as one of the lesser concerns.

Overall, we see very little change compared to previous years. For a clearer view the graph below focuses on the companies, for which the data series goes back to 2013.



#### TRENDS FOR THE INDUSTRY

In this edition of the survey, the open question about trends that will dominate the industry has been split to allow the respondents to distinguish between positive and negative trends.



The most striking conclusion is that 38% of the respondents have not identified any positive trend for 2018, while only 14% did not report any negative trend. This denotes a negative

sentiment in the market which is in striking contrast with the positive signs that we receive through the responses about market evolution and investment intentions.

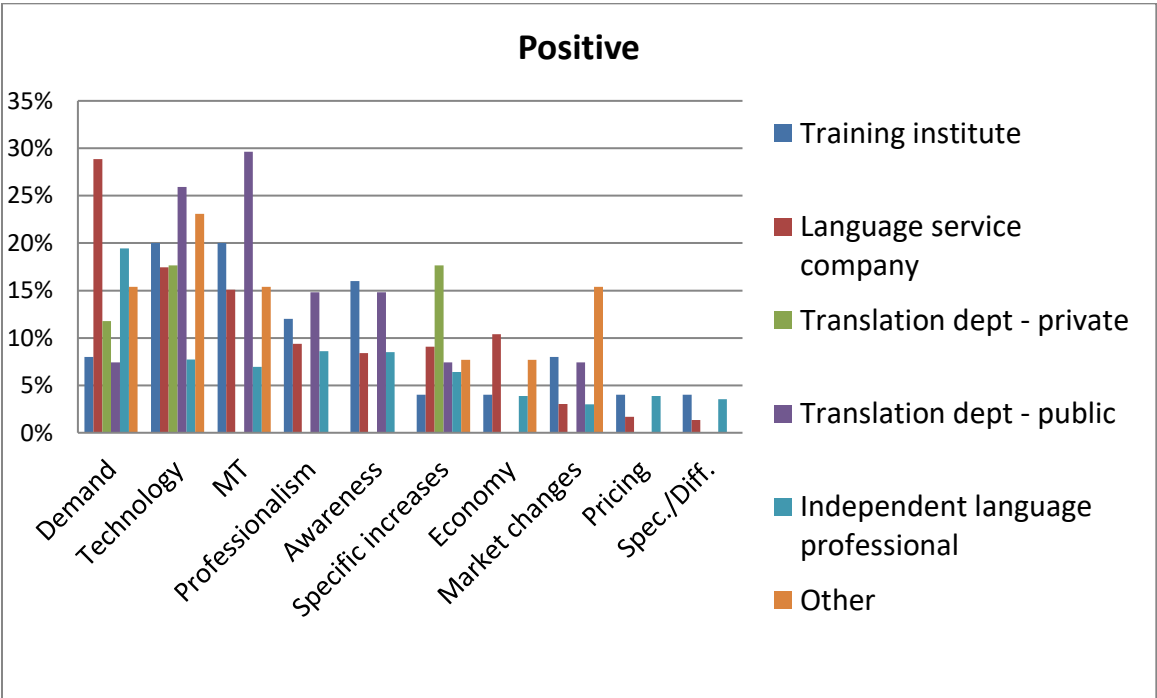
The explanation to this apparent contradiction is to be found in the prevailing negative trend “Price Pressure” which after a short-lived interval in 2017, when machine translation was most often reported as prevailing trend, is convincingly back in pole position.

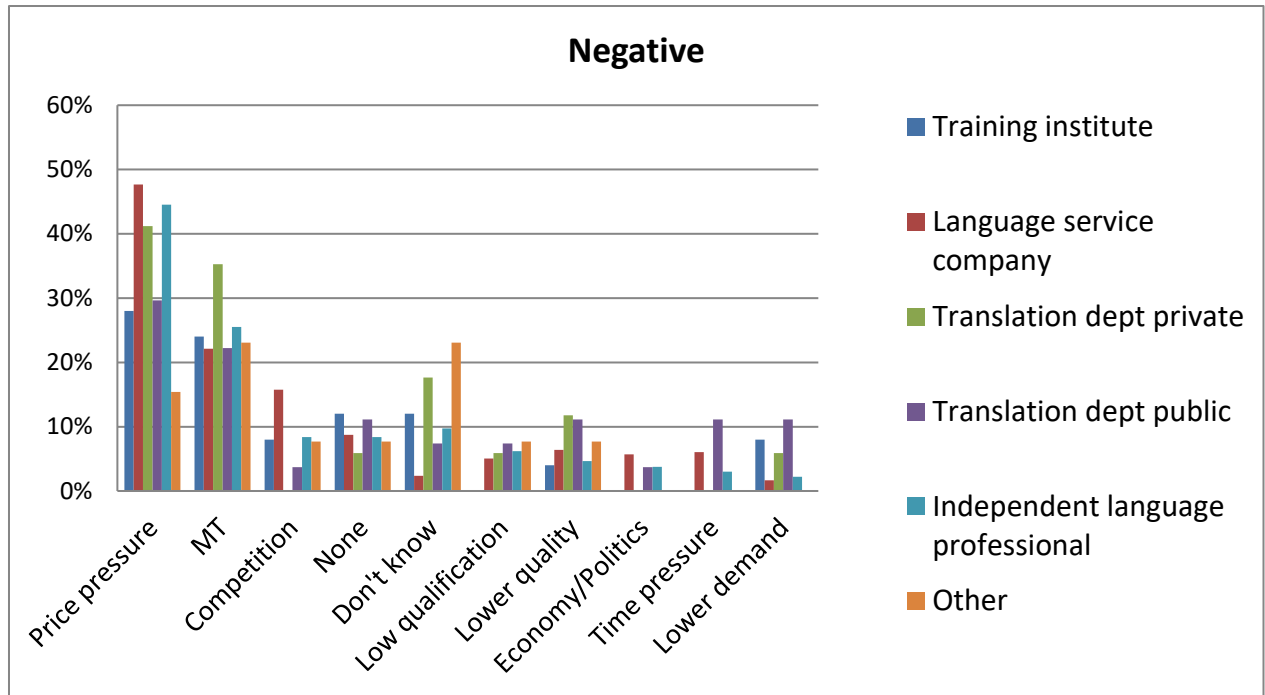
The fact that both language service companies and individual professionals see price pressure as a prevailing negative trend but at the same time expect a status quo on pricing indicates that they are fairly confident that they will be able to withstand the pressure.

Across the board, the increase of translation demand is the most often cited positive trend for 2018, with 16% of the respondents. Advances in technology in general (including CAT), machine translation, increased professionalism and a higher awareness by the market of the importance of language services complete the top 5. Interesting to note is that quite a few respondents, in particular individual professionals, expect that the lack of quality of machine translation can lead to an increased appreciation for the quality of human translation.

That same machine translation clearly remains the number 2 among the negative trends, almost always correlated with the factor price pressure. The traditional fear that machine translation opens the door to lower quality and more competition by lower qualified translators and translation companies remains strong.

When analysing the responses by respondent type, the differences are striking. On the positive side, we see that advances in technology are mostly welcomed by training institutes, translation departments (machine translation only in public administrations!) and language service companies, and a lot less by individual professionals.





Although 15% of the translation companies mentioned machine translation as a positive trend, an even higher percent (22%) see it primarily as a negative one. Independent professionals are more extreme in their opinions about MT as a trend, with only 8% positive mentions and 26% negative ones.

Both categories are in line with each other regarding the prevailing price pressure trend, as well as on other trends such as in increase in competition by lower qualified providers.

It is to be noted though that neither seem to expect this competition to lead to a strong decrease in quality or quality awareness overall, with only 6% of the companies and 5% of the individuals expressing this concern.

The respondents from translation departments – both in private companies (12%) and in public administrations (11%) – are much more concerned about such a decrease in quality. However, due to the relatively low number of responses from translation departments (17 from private companies and 27 from public administrations), these results should be handled with caution.

All other trends are mentioned much less often, including economic and political developments (consequences of Brexit mentioned both on the positive and the negative side), time pressure, consolidation, changes in the market structure and government regulations.

## CONCLUSION

This 2018 edition of the European Language Industry survey reinforces the positive image that could already be seen in the 2017 results. Virtually all parameters point to higher confidence in the market, from expected sales levels, recruitment plans and investment intentions to the expectation that 2018 prices will be stable.

2018 is clearly the year of machine translation. This is the first year that more than half of the respondents declare that they are using the technology in one way or another. On the other hand, it is too soon to conclude that MT is now part of the translation reality, with only some 20% of the language service companies and independent language professionals reporting daily usage. Neural MT has clearly not yet brought the big change that the market is expecting.

Changes to the technology questions are giving us a better view of the actual use of CAT, MT and other technologies by the various categories of respondents. New questions about internships have brought us additional insights in the way that the market is looking upon this important tool to bridge the gap between the universities and the professional world.

Since its first edition in 2013, the survey is showing a remarkably stable picture of the challenges that the industry is reporting, both through the scores of the closed list of challenges and the open trend questions.

Price pressure, competition that is often perceived as unfair, and technological advances that are not initiated or controlled by the respondents remain the main concerns that the language industry – like so many others - is struggling with.

The organising associations wish to thank all respondents for their participation in this survey. Their input, including the candid opinions expressed in the open questions, is vital to get an accurate insight into the state of the language industry, today and tomorrow.