The State of the Linguist Supply Chain

Translators and Interpreters in 2020
By Hélène Pielmeier and Paul O'Mara   *January 2020*

CSA Research conducted a large-scale survey of translators and interpreters in all corners of the world in cooperation with ProZ.com, Translators without Borders, and several industry associations. We sought to characterize the demographics, behaviors, attitudes, and challenges of translators and interpreters at the turn of the 2020s. This report provides detailed data on the full set of responses we collected.

> **Note:** *Over time, CSA Research will publish additional data slices. These results will help inform and enrich discourse about the role and concerns of – and provide a voice for – the individual linguists without whom the language industry would not exist.*

What This Research Covers

In this report, we describe the methodology and information sources we used and present more than 50 figures and tables with data on: 1) linguists' offerings; 2) background and career; 3) clientele; 4) technology usage; 5) income from language services; 6) volunteer work; and the 7) evolving future.

Information Sources

This report is based on a survey conducted in July through September 2019 with 7,363 translators and interpreters that either work as freelancers or in-house at language service providers or buy-side companies.

Related Research

- "CSA Research Survey on Gender and Family in the Language Services Industry: Overall Findings"
- "Who's Who in the Language Services and Technology: 2019 Rankings"
- "The Language Services Market: 2019"

Contents

Methodology and Information Sources

Has translator productivity increased? Are career translators willing to post-edit machine translation output? Do they feel translation memories are sufficiently maintained? Are interpreters increasingly working remotely? Do linguists struggle with the number of vendor portals they have to log into? Are they likely to still be working in the profession five years from now?
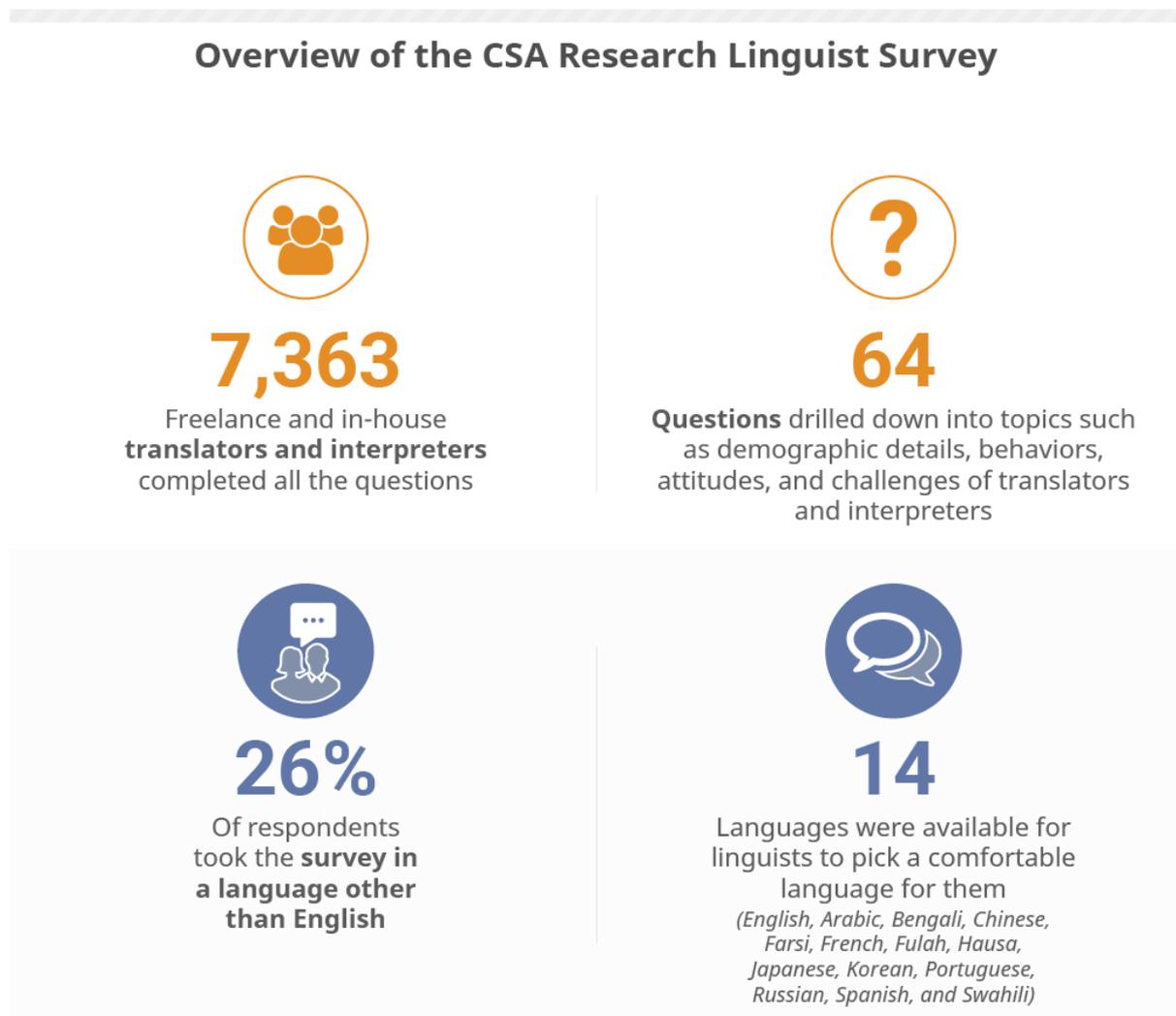
These and similar questions are the ones that executives and vendor managers at language service providers are pondering. But so do big buyers of language services that worry about the sustainability of the language supply chain they either contract with directly or through their agency partners. In addition, linguists may wonder how their experience compares to that of their peers around the world or where they can improve their work experience.

To address these questions, CSA Research conducted a large-scale survey of translators and interpreters in all corners of the world. Our goal was to characterize the demographics, behaviors, attitudes, and challenges of translators and interpreters to understand the present reality − and likely future − for linguists.

Survey Audience

In order to credibly forecast the future state of freelance and in-house linguists and how buyers and LSPs need to prepare for the evolution of the market, we needed a large enough response sample from a broad pool of profiles around the world.

We are proud to announce that – during a nine-week period – more than 11,000 translators and interpreters started the survey while 7,363 completed our very long questionnaire (Figure 1). This extremely strong sample successfully covers a variety of profiles on all continents, from freelance to in-house translators and interpreters, aspiring professionals and veterans, and pro bono contributors and regularly paid workers.

Figure 1: Overview of the CSA Research Linguist Survey

Overview of the CSA Research Linguist Survey

7,363

Freelance and in-house
translators and interpreters
completed all the questions

64

Questions drilled down into topics such
as demographic details, behaviors,
attitudes, and challenges of translators
and interpreters

26%

Of respondents
took the **survey in
a language other
than English**

14

Languages were available for
linguists to pick a comfortable
language for them
*(English, Arabic, Bengali, Chinese,
Farsi, French, Fulah, Hausa,
Japanese, Korean, Portuguese,
Russian, Spanish, and Swahili)*

Source: CSA Research

Survey Languages

We had the survey translated into Russian and several Asian languages to encourage participation in geographic areas from which we have traditionally encountered low response rates due to cultural and language preferences. In order to increase the accessibility and reach of the effort, the Translators without Borders community provided support by translating the survey into a number of major languages specific to Africa, South Asia, and the Middle East. In the end, about one-quarter of respondents (26%) chose a language other than English to participate in the study, showing a strong

preference for taking a survey in their own language, even if some may have just been curious about the quality of the translations we provided.

> **Note:** *The languages offered were English, Arabic, Bengali, Chinese (Simplified), Farsi, French, Fulah, Hausa, Japanese, Korean, Portuguese, Russian, Spanish, and Swahili.*
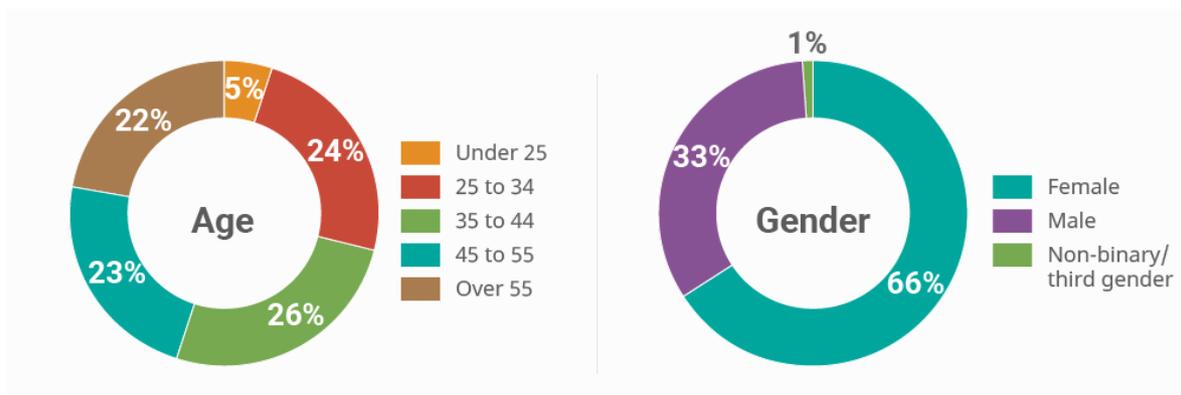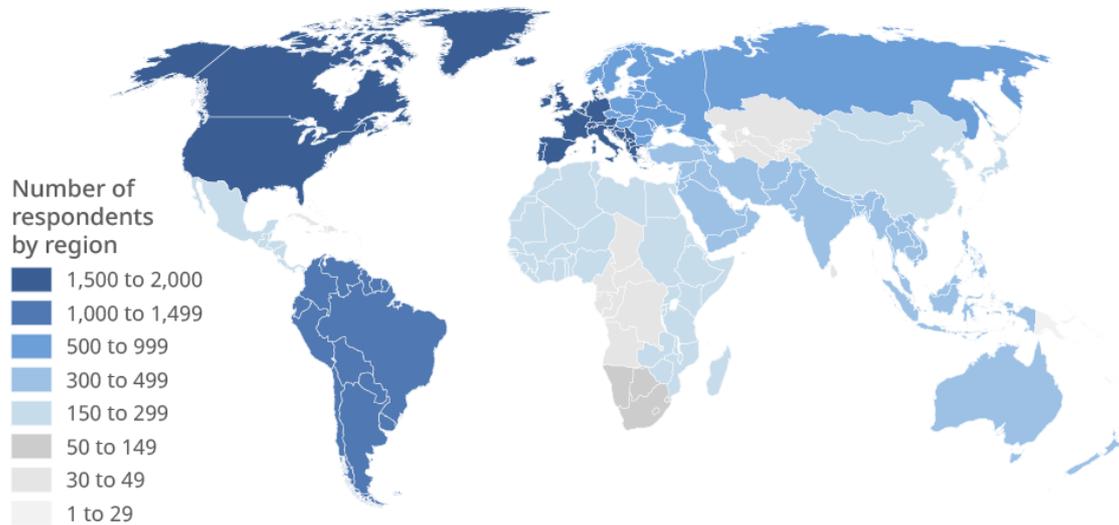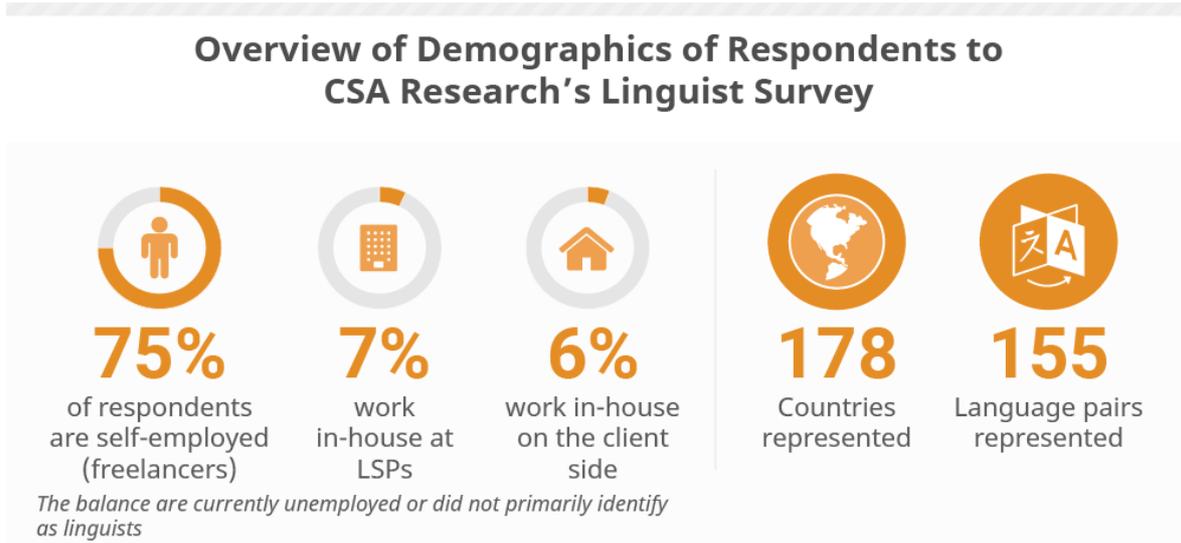
Partners

Various organizations partnered with us to promote the survey with translators and interpreters in their network and with their in-house staff. Their help was essential in achieving such impressive numbers.

- **ProZ.com:** This popular linguist marketplace is a helpful conduit to reach linguists worldwide. The ProZ.com team added notifications within their platforms that generated thousands of responses.

- **Translators without Borders:** This nonprofit organization actively promoted the survey to its diverse community of linguists, who represent a broad range of experience levels and languages and have strong representation in countries that are otherwise difficult to reach.

- **Many other organizations:** The list is too long for us to mention everybody, but many translator and interpreter associations as well as language service providers saw the value in this research and actively promoted the survey to their list of contacts. A special thank you to Lionbridge which brought 400 surveys to the finish line and the Translation Bureau of Canada who made it its mission to ensure we achieved a representative sample for Canada. FIT, GALA, Women in Localization, and Multilingual also actively got involved with outreach to their members and readers.

Respondent Demographics

Figure 2 provides data on the profile of our survey respondents, demonstrating a broad coverage in profile and demographics. We asked them to complete the survey thinking about their main job as a linguist – that is, the role where they do the most translation or interpreting.

Figure 2: Overview of Survey Respondents

Overview of Demographics of Respondents to CSA Research's Linguist Survey

75%
of respondents are self-employed (freelancers)

7%
work in-house at LSPs

6%
work in-house on the client side

178
Countries represented

155
Language pairs represented

The balance are currently unemployed or did not primarily identify as linguists

Number of respondents by region
- 1,500 to 2,000
- 1,000 to 1,499
- 500 to 999
- 300 to 499
- 150 to 299
- 50 to 149
- 30 to 49
- 1 to 29

Age
- 5% Under 25
- 24% 25 to 34
- 26% 35 to 44
- 23% 45 to 55
- 22% Over 55

Gender
- 66% Female
- 33% Male
- 1% Non-binary/third gender

Source: CSA Research

> **Note:** *The varied profiles and demographics of respondents bring different perspectives to this research. If linguists read the report and find that some sections don't represent them closely, they should keep in mind that this may be the reality for other translators or interpreters. Averages presented are simply that – averages. The results demonstrate that there is no single profile of the people performing the linguistic work on projects and jobs.*

Data Cleansing

The value of the data we collect and the aggregated information and analysis that we produce depends on the quality of the survey data. We conducted a variety of steps to:

- **Eliminate fake answers.** We deploy various data testing strategies to identify respondents who took the survey but did not share real information on some or all questions. This is vital to ensure we process only valid data.

- **Review outliers.** We rely on a variety of statistical calculations and data visualizations to identify out-of-bounds answers for every single question of the survey. We systematically review minimum and maximum values, average results, median values, frequencies, standard deviations, and spread of the data.

- **Translate free-text answers.** Linguists submitted thousands of comments in the various "other" and "comment" fields in the survey. We translated their answers back to English so we could recategorize answers as needed. As a fun tidbit about the survey processing, the beauty of working with such a multilingual group is that we found Chinese free-text answers in the Russian version of the survey and many other such combinations that kept our data processing team on its toes.

Linguists' Offerings

We use "linguist" as a general term to encompass the various roles tied to the transfer of information from one language into another, with a focus on translators and interpreters.

In this chapter, we cover details about respondents': 1) languages; 2) service focus; 3) work preferences; and 4) perceptions of client preferences.

Languages

We asked survey respondents to give us the source and target languages for the language pair where they do the most translation or interpreting volume. We received responses across 175 languages, with English < > French as the most frequent language combination. Table 1 breaks down the frequency of the 20 most common combinations. Eight of these have a source other than English. German to French is the only pair in the top occurrences that doesn't include English as a source or target.

Table 1: Top Language Pairs

Top 20 Language Pairs	Percentage of Respondents
English to French	11.51%
English to Spanish	10.87%
French to English	5.31%
English to Portuguese	5.12%
Spanish to English	4.26%
English to German	3.67%
English to Italian	3.59%
German to English	3.22%
English to Arabic	2.64%
English to Russian	2.54%
Russian to English	1.51%
Italian to English	1.41%
Portuguese to English	1.29%
German to French	1.28%
English to Dutch/Flemish	1.20%
Arabic to English	1.17%
English to Greek	1.16%

English to Japanese	1.06%
English to Turkish	1.05%
English to Polish	0.99%

Source: CSA Research

We asked survey respondents which language they consider to be their mother tongue, allowing a single answer. Figure 3 shows the results. English topped the list (17% of respondents), followed by French and Spanish (both 13%). When we sorted the languages into broad groups, Romance languages (French, Italian, Spanish, etc.) were predominant, followed by Germanic (English, Dutch, German, etc.) and Slavic (Czech, Polish, Russian, etc.) ones.

Figure 3: Most Common Mother Tongues
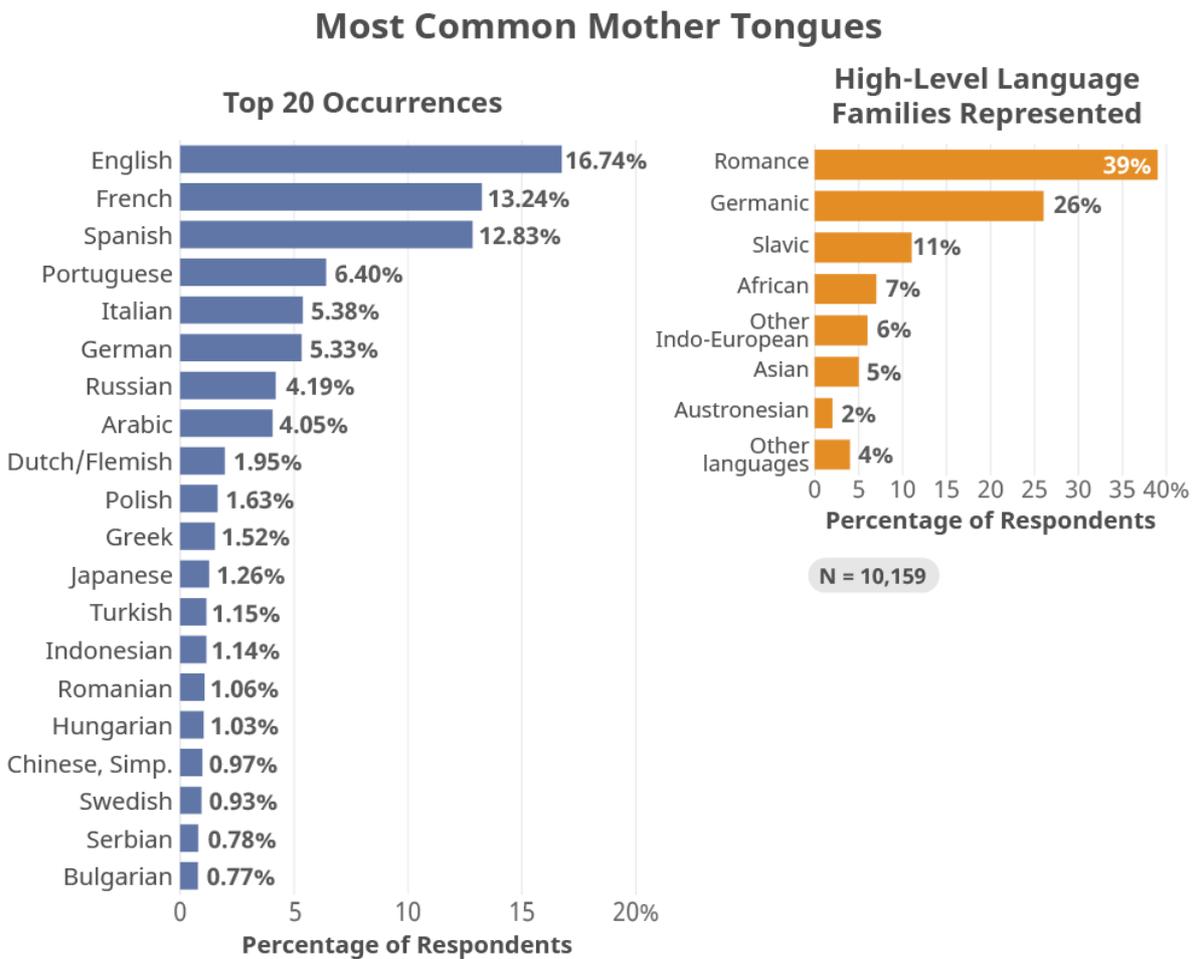
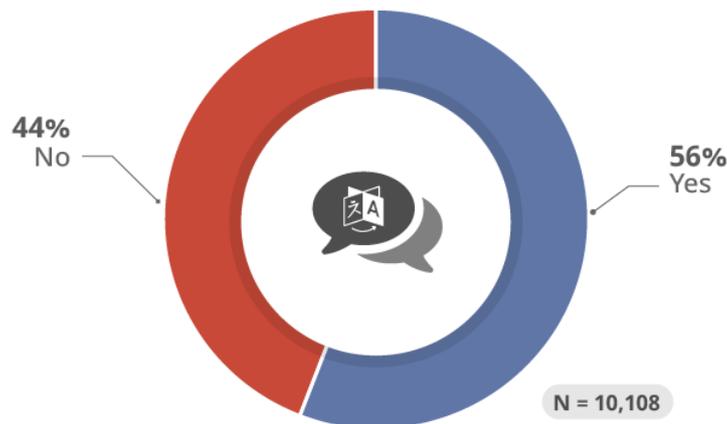*Source: CSA Research*

This result begged the question of whether respondents ever translate or interpret into languages other than their mother tongue. More than one-half (56%) reported doing so – whether occasionally or frequently (Figure 4).

Figure 4: Linguists Working into Languages Other Than Their Mother Tongue

Do you ever translate or interpret into languages other than your mother tongue?

44% No

56% Yes

N = 10,108

Source: CSA Research

We found that:

- **On average, respondents perform 76% of their work into their mother tongue.** Yet only 31% earn all of their revenue from their dominant language pair.

- **Those working in the reverse direction average 29% in that combination.** Upon further inspection of the respondents' data, we discovered it is a common occurrence in three cases: 1) interpreting; 2) in countries where many people identify as bilingual from birth (such as Spanish in the U.S.); and 3) for languages where few linguists are available to translate the other way (such as Marathi, Mongolian, or Thai into English).

- **Those working in other pairs average 19% of their work from them.** Working in two languages that don't include their mother tongue was more common among respondents in regions where a second language played a significant historic role.

For example, a Ukrainian translator is likely to be very comfortable translating from German into Russian. Likewise, linguists in Africa frequently excel in the colonial language even if it is not the person's mother tongue.

Note: *In both cases of work into languages other than the mother tongue, we did find linguists who perform 100% of their work in these non-dominant pairs.*

Service Focus

We asked linguists to tell us what percentage of their language services revenue is derived from written and spoken language services as well as other offerings.
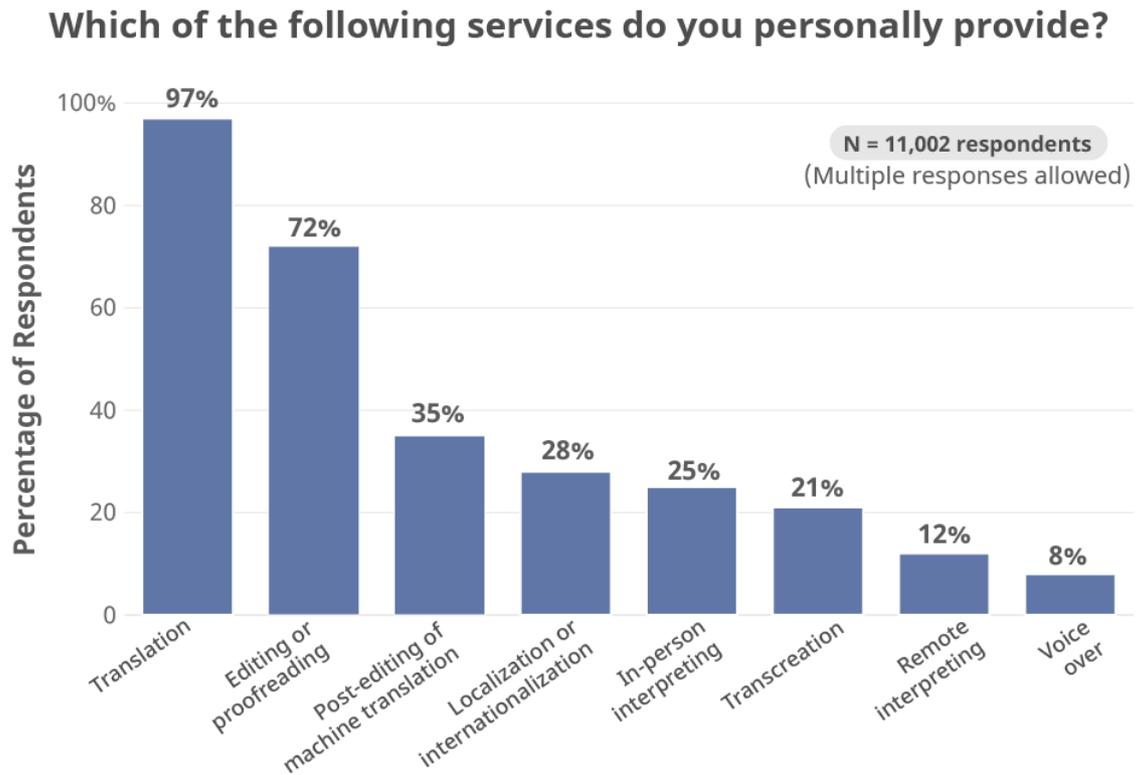
- **Written language services.** They include services such as translation or localization and represent an average of 84% of the revenue for those who offer such services. About one-half of respondents (52%) focus exclusively on written language services.

- **Spoken language services.** They encompass interpreting but also voice-overs. Respondents that perform such services derive an average of 32% of their revenue from them. Just 3% of respondents in our sample focus exclusively on spoken language services.

- **Other offerings.** Under one-third of respondents (30%) offer services such as training and consulting and such offerings represent 21% of their revenue. Note that we asked in-house linguists to log other responsibilities in this category.

Respondents told us what services they specifically provide. They could select all that apply. Figure 5 displays the incidence in our sample with translation being a nearly systematic offering (97% of respondents). Editing or proofreading are commonplace for about three-quarters of respondents (72%). After that, numbers drop sharply as linguists specialize into other offerings such as MT post-editing (35%), localization and internationalization (28%), and in-person interpreting (25%). On average, linguists selected three answers, showing the importance of offering several language-related tasks.

Note: *The numbers for some of the services, such as post-editing, are lower than some of the partner groups have found in their internal surveys. This is likely to*

*reflect demographic differences from CSA Research's broad sample and from
variations in how questions were asked.*

Figure 5: Services That Linguists Personally Provide

Which of the following services do you personally provide?

N = 11,002 respondents
(Multiple responses allowed)

Translation 97%
Editing or proofreading 72%
Post-editing of machine translation 35%
Localization or internationalization 28%
In-person interpreting 25%
Transcreation 21%
Remote interpreting 12%
Voice over 8%

Source: CSA Research

For interpreters, we followed up to better understand how much they work remotely –
as opposed to in-person. Table 2 shows their answers in terms of time spent and
revenue from remote interpreting services, with a similar average of 32% for both. Out
of the pool of interpreters who responded, 12% work in-person only and 1% work
remotely only.

Table 2: Amount of Remote Interpreting

Amount of Remote Interpreting					
	Average	**Minimum**	**Maximum**	**Median**	**Count**
Percentage of time spent interpreting remotely	32%	1%	100%	20%	1,237
Percentage of interpreting revenue that is derived from remote interpreting	32%	1%	100%	20%	1,147

Source: CSA Research

Work Preferences

Just because linguists have a broad portfolio of skills does not mean that they like to practice them equally. Most translators overwhelmingly prefer "pure" translation (89% of respondents). Only 8% reported preferring editing and 3% post-editing machine translation. On the interpreting front, nearly four out of five (79%) prefer in-person interpreting over remote modalities (Figure 6).

Figure 6: Preferred Linguist Tasks
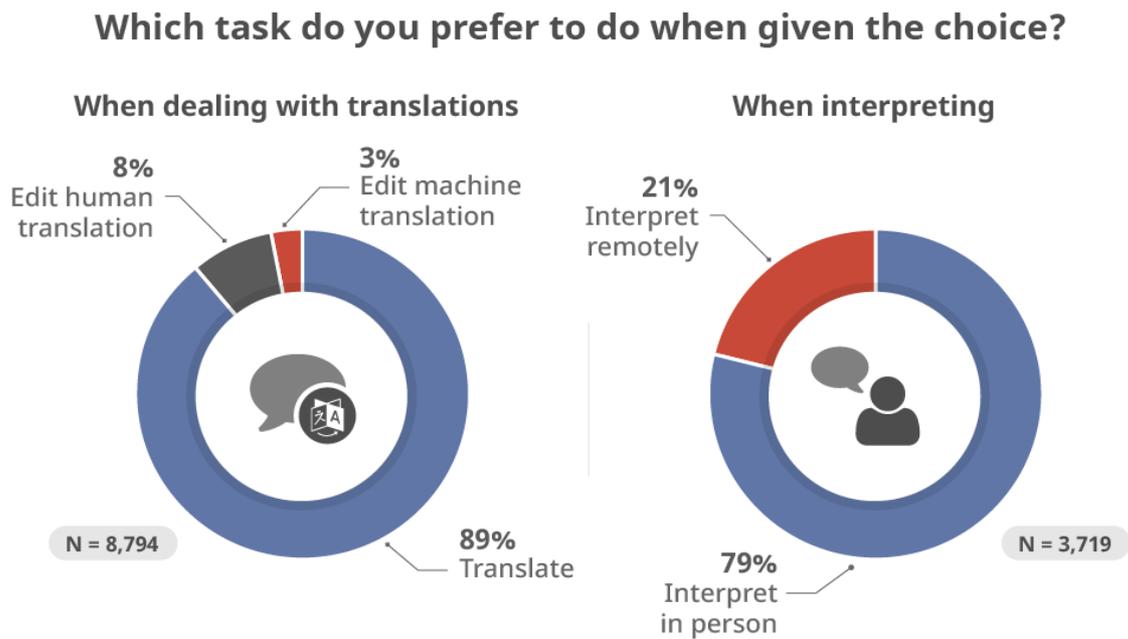
Source: CSA Research

While nearly one-half of translators (47%) like projects of any size, mid-size jobs tend to be preferred (45%). Large projects can make it difficult to juggle the needs of regular accounts. Small projects can mean too much administrative work for the pay (Figure 7).

Figure 7: Appeal of Working Directly for Clients

What type of projects do you prefer working on?

Anything works for me — 47%
Mid-sized projects — 45%
Small projects — 29%
Large projects — 26%

N = 8,972 respondents
(Multiple responses allowed)

Percentage of Respondents
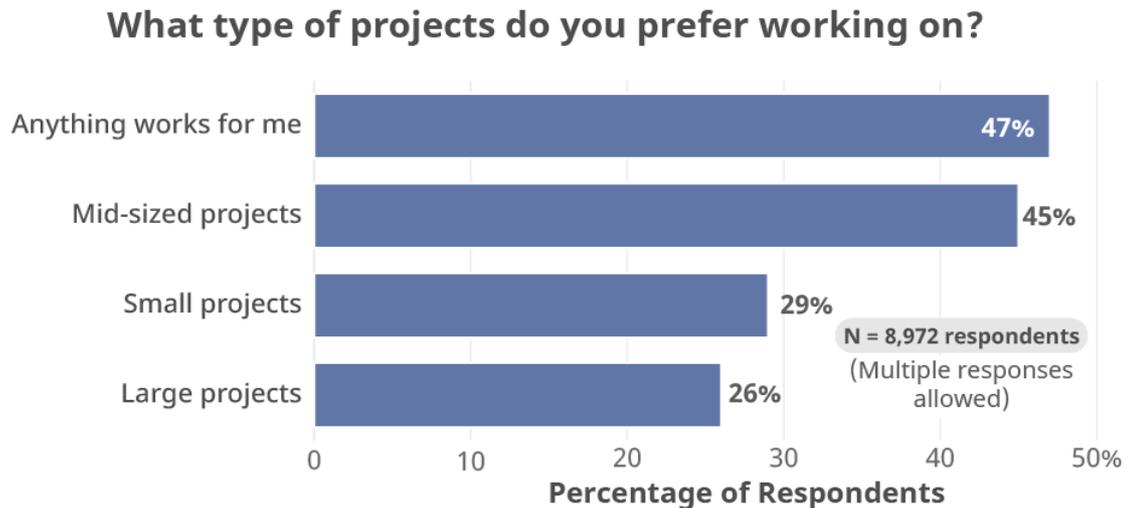
Source: CSA Research

In their free-text comments, linguists mentioned overwhelmingly that what they want is a mix of project types to balance income predictability and mental stamina.

> *"A good mix is the best, larger projects for long-term planning but with enough time for the small jobs in between."*

> *"Generally, I prefer larger projects (easier to plan my schedule) but small projects help to fill up the gaps in between."*

> *"I like having a mix of larger projects for security combined with smaller ones for a mental break."*

However, beyond size, they yearn for well-organized projects with decent rates and timelines and come from regular accounts.

Perceptions of Clients' Preferences

Linguists' performance when delivering their services can link to their understanding of clients' preferences. Figure 8 provides linguists' perspectives on what they perceive clients care the most about. The top answer is for cost over quality (40% of respondents) versus on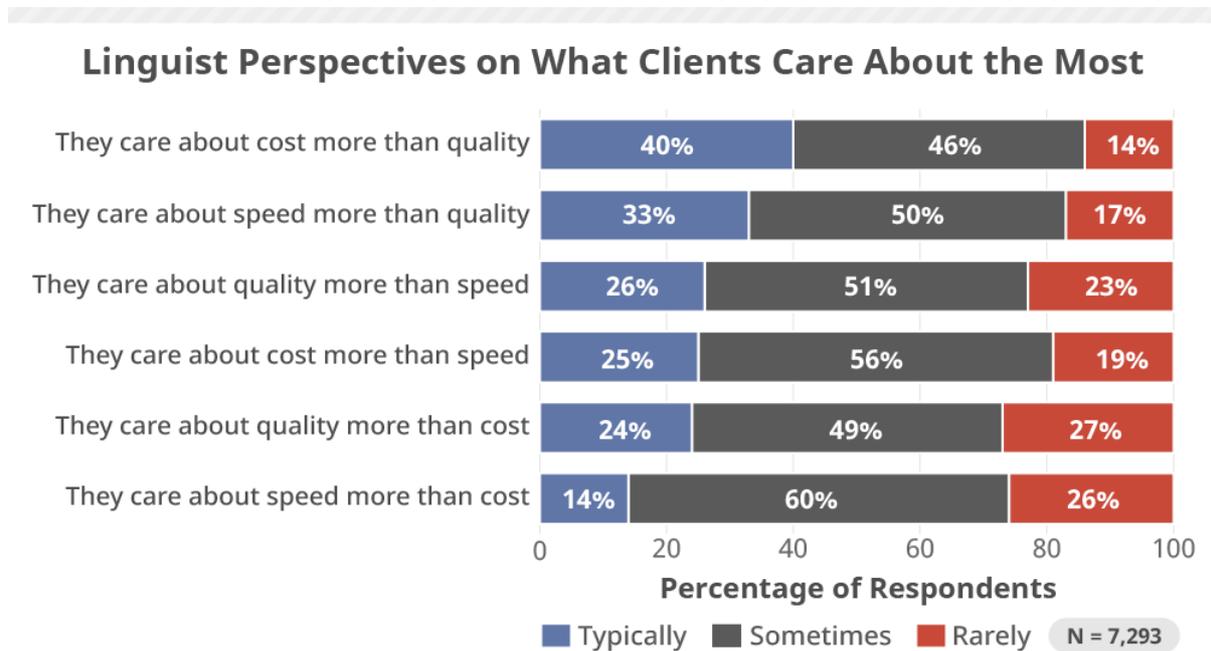ly about one-quarter (24%) that feel the reverse is true. Speed is the second element where they perceive that clients care about it more than quality (33%) although the reverse combination is close behind (26%).

Figure 8: Linguists' Perspectives on What Clients Care About the Most

Linguist Perspectives on What Clients Care About the Most

	Typically	Sometimes	Rarely
They care about cost more than quality	40%	46%	14%
They care about speed more than quality	33%	50%	17%
They care about quality more than speed	26%	51%	23%
They care about cost more than speed	25%	56%	19%
They care about quality more than cost	24%	49%	27%
They care about speed more than cost	14%	60%	26%

Percentage of Respondents

■ Typically ■ Sometimes ■ Rarely   N = 7,293

Source: CSA Research

> *"As regards cost/quality/speed questions, my clients usually start by caring most about cost BEFORE the project starts, then they care most about speed DURING the translation process, and WHEN THE PROJECT IS OVER, they complain about quality/terminology-related stuff."*

Background and Career

We wanted to better understand where qualified linguists come from these days. Translators and interpreters shared some information with us on their: 1) background and experience; 2) career focus; 3) relationship to their second job; 4) educational background; and 5) career development initiatives.

Background and Experience

On average, our respondents have been translating or interpreting for 14 years. Figure 9 shows the distribution of their years of experience. We successfully managed to capture a broad range of profiles – we purposefully targeted the full range of profiles from new to the profession all the way to veterans.

Figure 9: Linguists' Years of Experience

How many years of experience do you have working as a translator or interpreter?

Under 2 years	9%
2 to 5 years	17%
6 to 10 years	19%
11 to 15 years	17%
16 to 20 years	14%
21 to 30 years	16%
31 to 40 years	6%
More than 40 years	2%

N = 9,785
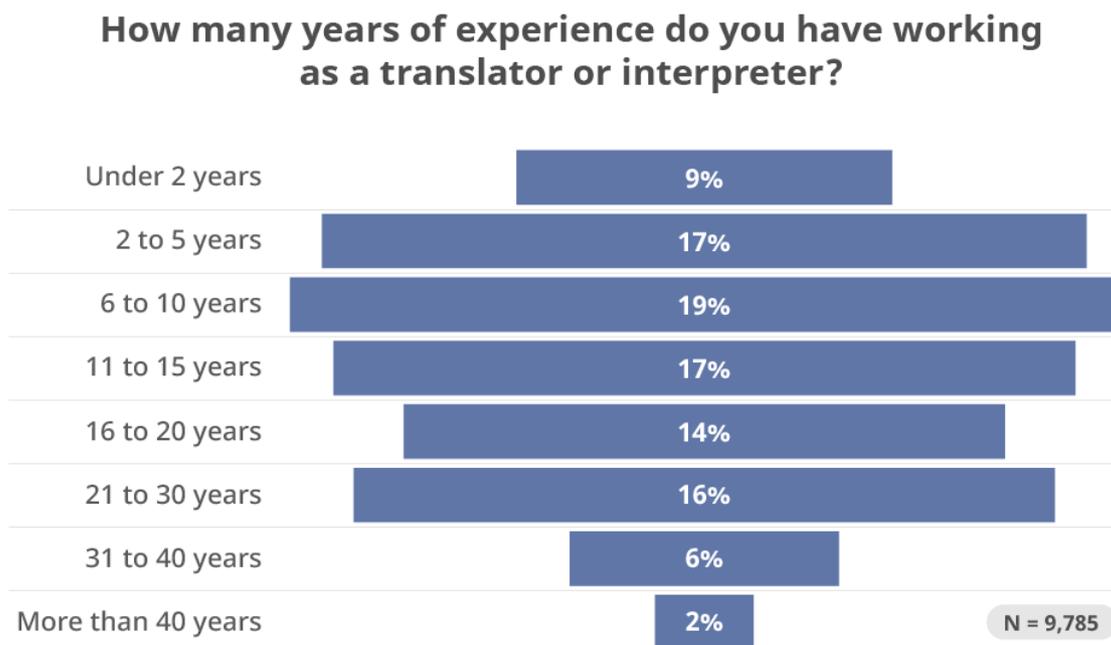
Source: CSA Research

How does one become a professional linguist? We found that 42% of respondents worked in the language services industry prior to their current linguist job (Figure 10).

Figure 10: Prior Experience in the Language Services Industry

Did you work in the language services industry prior to your current job as a linguist?

58% No

42% Yes

N = 9,090
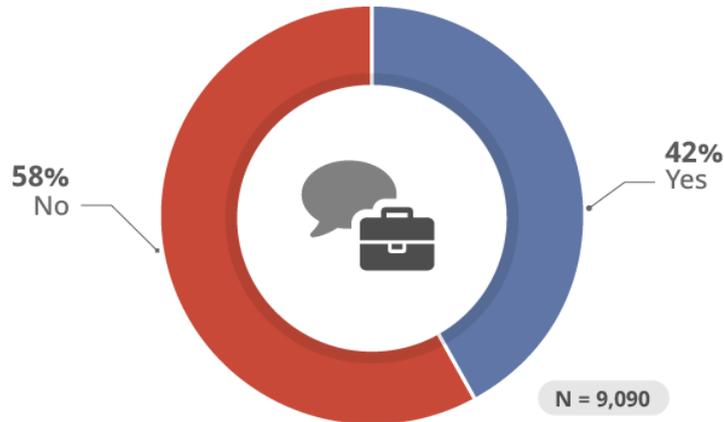
Source: CSA Research

Career Focus

We asked actively practicing respondents to select the number of hours they spent translating or interpreting – including paid jobs but excluding pro bono work. Their answers averaged 28 hours per week. Responses ranged from a handful of hours to well over 70 per week. Figure 11 displays the ranges of work hours respondents selected.

Figure 11:

On average, how many hours per week do you spend translating or interpreting?

14% — Less than 10 hours
19% — 10 to 20 hours
21% — 21 to 30 hours
27% — 31 to 40 hours
13% — 41 to 50 hours
6% — Over 50 hours

N = 9,014
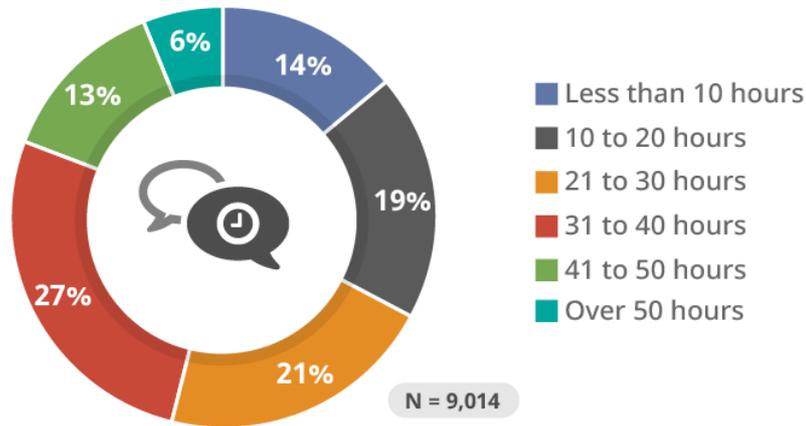
Source: CSA Research

A large majority (62%) work exclusively at their translator or interpreter profession. The balance hold another job – and sometimes more than one – either inside or outside of the language services industry (Figure 12).

Figure 12: Employment Beyond the Linguist's Main Job

Do you have another job?

23% Yes (outside the language services industry)

62% No

15% Yes (inside the language services industry)

N = 10,096
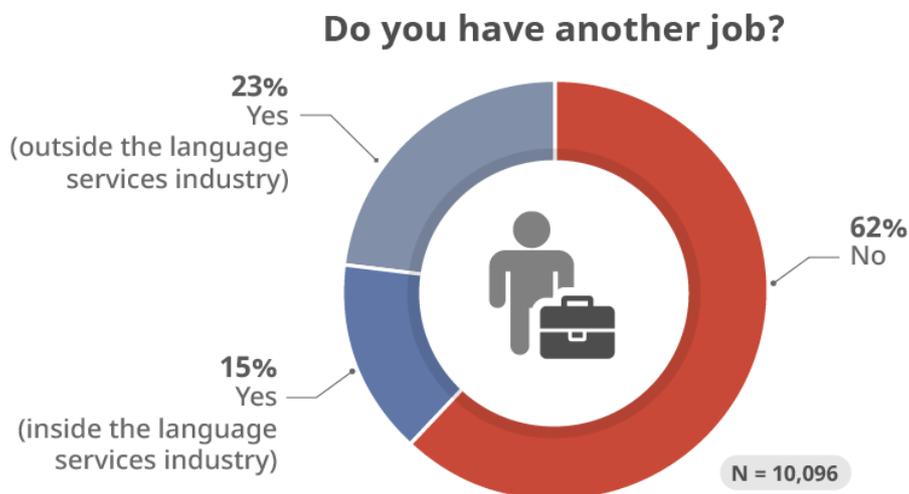
Source: CSA Research

We collected more than 1,400 respondent's comments on the nature of their second job(s). Among the titles they cited, the main employment categories that emerged were:

- **Educators**. About one-half of respondents listed roles tied to teaching from tutors and school teachers all the way to university professors. Many of them teach languages, translation, or interpreting.

- **Translators and interpreters**. About one in seven of the titles they cited was a secondary linguist job. These are primarily cases where in-house linguists supplement their income with some freelance work, or vice-versa.

- **LSP workers.** Approximately one in seven cited positions at language service companies. They are mainly project managers, but we also found executives, business developers, account managers, and vendor managers.

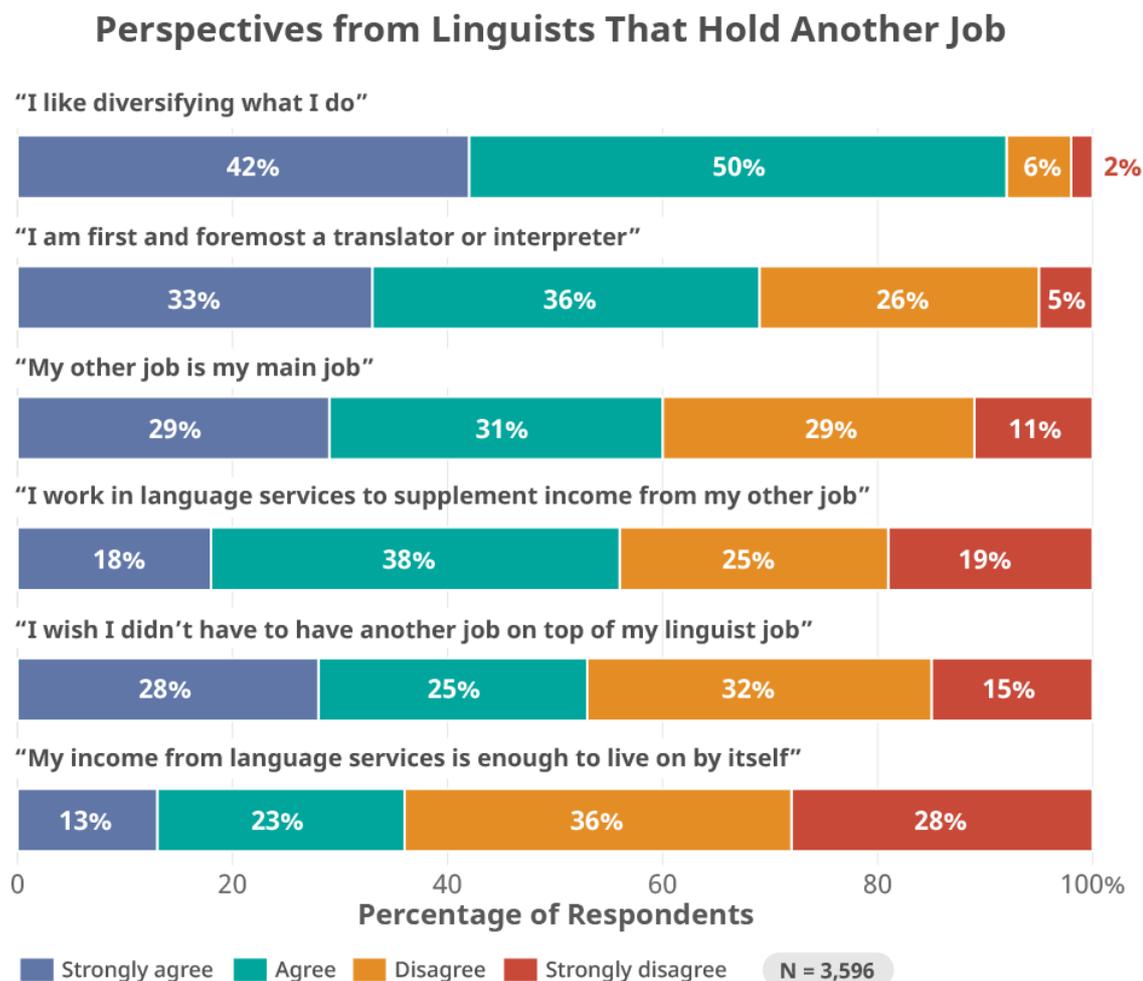- **Positions in the content writing or communication field**. Around 7% of respondents referred to work as copywriters, content editors, journalists, technical writers, exam writers, or training developers. And some in this group were more focused on marketing, public relations, radio broadcasting, SEO analysis, and social media content or digital marketing management.

- **Roles linked to main linguist skills.** Around 6% of respondents mentioned roles beyond translators and interpreters where language skills are essential. This included voice talents, transcriptionists, QA testers, TM trainers, subtitlers, and desktop publishers. Some also use their language skills for consulting as cultural mediators or as language consultants. Finally, we found 19 tour guides in the responses.

- **A broad bucket of others.** Responses covered everything from lawyer and doctor, to yoga instructor, funeral home speaker, and landlady. Linguists are multi-talented and hiding in many other jobs where you would not naturally guess they freelance language services on the side.

Relationship to Their Second Job

We asked actively practicing linguists that have a second job to rate their level of agreement with various statements about their relationship to this other job (Figure 13).

Figure 13: Perspectives from Linguists That Hold Another Job

Perspectives from Linguists That Hold Another Job

"I like diversifying what I do"

| 42% | 50% | 6% | 2% |

"I am first and foremost a translator or interpreter"

| 33% | 36% | 26% | 5% |

"My other job is my main job"

| 29% | 31% | 29% | 11% |

"I work in language services to supplement income from my other job"

| 18% | 38% | 25% | 19% |

"I wish I didn't have to have another job on top of my linguist job"

| 28% | 25% | 32% | 15% |

"My income from language services is enough to live on by itself"

| 13% | 23% | 36% | 28% |

0   20   40   60   80   100%

Percentage of Respondents

■ Strongly agree   ■ Agree   ■ Disagree   ■ Strongly disagree   N = 3,596

Source: CSA Research

A few patterns emerge:

- **Diversification is a conscious choice.** Most linguists (92%) appreciate diversifying what they do. This means that trying to contain these individuals within a single role may not motivate them in the long run.

- **Being a linguist is a source of pride.** Even when they have a second job, 69% of them see themselves first and foremost as a translator or interpreter.

- **Dual jobs are a necessity for some of them.** More than one-half of respondents (54%) find their language services income insufficient to live on by itself. However,

the main job of 60% of respondents is their other profession – and 53% wish they didn't have to supplement income from that job. Being a linguist that works as needed offers the opportunity for talented speakers of another language to make ends meet.

Educational Background

Linguists shared with us the highest level of education that they reached, selecting from a list of options we provided. While degree names don't line up across countries, respondents managed to find their closest match. Linguists tend to be an educated bunch – 46% hold a master's, while 38% have a bachelor's degree (Figure 14).

Figure 14: Linguists' Highest Level of Education

What is the highest level of education you have reached?

Education Level	Percentage
Secondary or high school	5%
Technical college or associate's	6%
Bachelor's	38%
Master's	46%
Doctorate	5%

N = 9,181
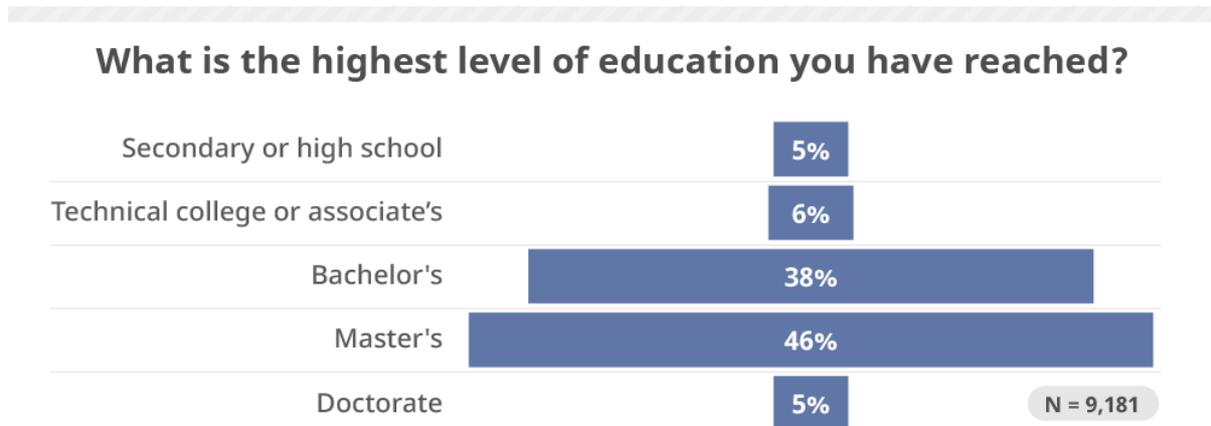
Source: CSA Research

We also inquired whether they have formal translator or interpreter education. More than one-half (53%) do, 4% are currently in school for it, and 43% don't hold a specific diploma (Figure 15). Some regions like Europe have emphasized the importance of formal translator education rather than lateral movement into the field from another profession.

Figure 15: Linguists and Formal Translator or Interpreter Education

Do you have formal translator or interpreter education?

43%
No

53%
Yes

4%
In progress

N = 9,332
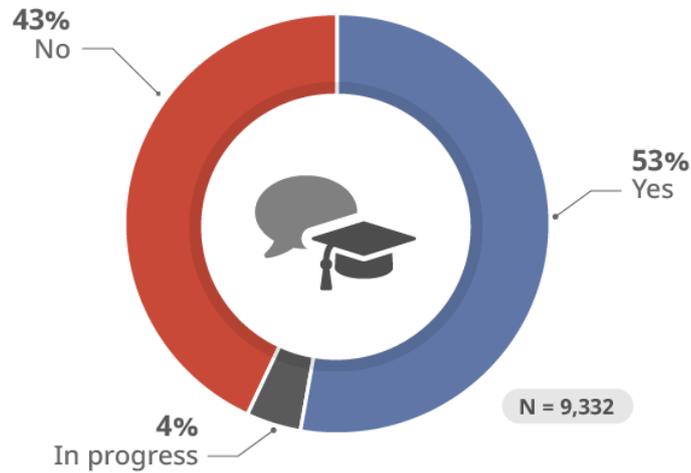
Source: CSA Research

We also asked about translator or interpreter certifications. We found that 43% of respondents hold a certification in their mother tongue (Figure 16). In addition, 17% said they have certifications in other languages.

> **Note:** *Results may be overinflated. The question was aimed at collecting data on translator and interpreter certifications beyond formal education and quite a few linguists repeated their response to the previous question or listed monolingual tests such as the TOEFL.*

Figure 16: Linguists and Formal Certifications in Their Mother Tongue

Do you have formal translator or interpreter certifications in your mother tongue?

54% No

43% Yes

3% In progress

N = 7,010
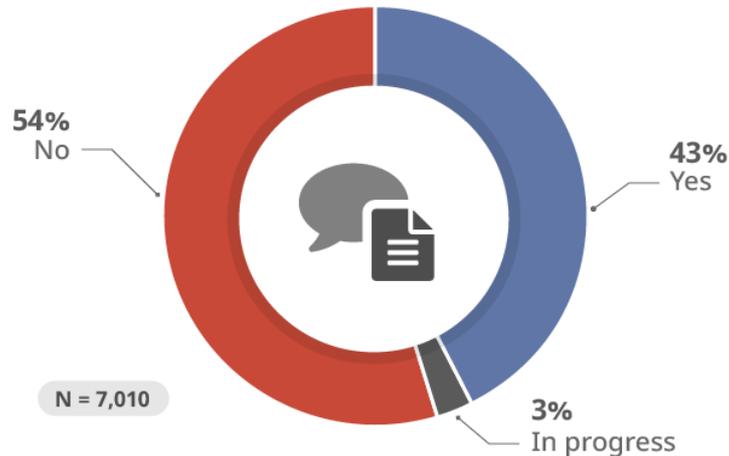
Source: CSA Research

Linguists listed certifications from the following sources:

- **Professional associations.** Respondents cited in great numbers the certification from the American Translator Association but also those of translator and interpreter associations around the world, such as the Chartered Institute of Linguists and the Institute of Translation and Interpreting.

- **Translator or interpreter schools.** Some academic programs offer certifications in addition to traditional diplomas.

- **Accreditation authorities.** Some cities, states, and national or federal institutions offer certification programs to qualify "sworn translators" or "certified interpreters." We also found instances of international organizations such as the United Nations or army branches that have language schools. National organizations also were common such as Certified Medical Interpreter, the Certification Commission for Healthcare Interpreters, and National Accreditation Authority for Translators and Interpreters.

- **Online and on-site training companies.** Options abound for linguists, especially for medical interpreter training – such as Bridging the Gap, Community Interpreter, Certified Translation Professional, and WLS Professional Translation Certificate.

- **Marketplaces.** Dozens of respondents mentioned the ProZ.com Certified Pro status.

- **Language service providers.** For example, LanguageLine offers a certification for its over-the-phone interpreters and Translators without Borders provides a training course in translating for humanitarian organizations.

Career Development Initiatives

Continuously maintaining language skills remains important regardless of degrees and certifications. For 93% of respondents, exposure to the languages they work in is vital. To keep current they read, watch movies, and spend time in-country. Beyond those experiential means, they also supplement their knowledge by asking questions about the materials that they work on (53%) (Figure 17).

In comments, respondents cited other approaches such as living in-country, mentoring by peers, technology provider resources, and attending online courses. The recurrent theme in answers entailed building linguistic corpora and terminology through reading and research in specialized domains.

Figure 17: Maintaining Language Skills

How do you continually maintain and develop your language skills?

Response	Percentage
I get exposure to the language through reading, movies, spending time in-country, etc.	93%
I ask questions on materials I work on	53%
I attend translator and interpreter conferences	36%
I complete training offered by organizations specialized in training translators or interpreters	36%
I request detailed feedback from my clients	34%
I attend training offered by language service providers	27%
I attend training offered by end clients	13%

N = 9,193 respondents
(Multiple responses allowed)

Percentage of Respondents

Source: CSA Research

We provided some space for respondents to share what has had the biggest effect on their skill development. We received more than 5,800 comments. Answers centered on active observations in everyday life; linguist education and continuing education; immersive communication in the language; exposure to the language (in particular through reading); experience in-house at an LSP, buy-side language department, or in the field of specialty; years of practice; the development of a specialty; and feedback from peers and customers.

> *"Every project I face offers the opportunity to evolve, develop new skills and gain new knowledge thanks to the many different materials I'm exposed to and the terminological problems I have to solve. Everything is an opportunity for personal enrichment."*

> *"One of my clients pointed out some of the mistakes that I had been making unintentionally and that really helped me boost my performance."*

> *"I get to know the language by reading, watching movies, traveling to countries where it is spoken, etc."*

> *"1. Reading, especially books (+ for languages, + for knowledge, + for ability to focus). 2. Knowing the subject, in theory (education in the fields of specialization) and practice (building my own websites, running my own online stores). 3. Taking care of my physical, emotional, and "social" health (I imagine this is even more important for interpreters)."*
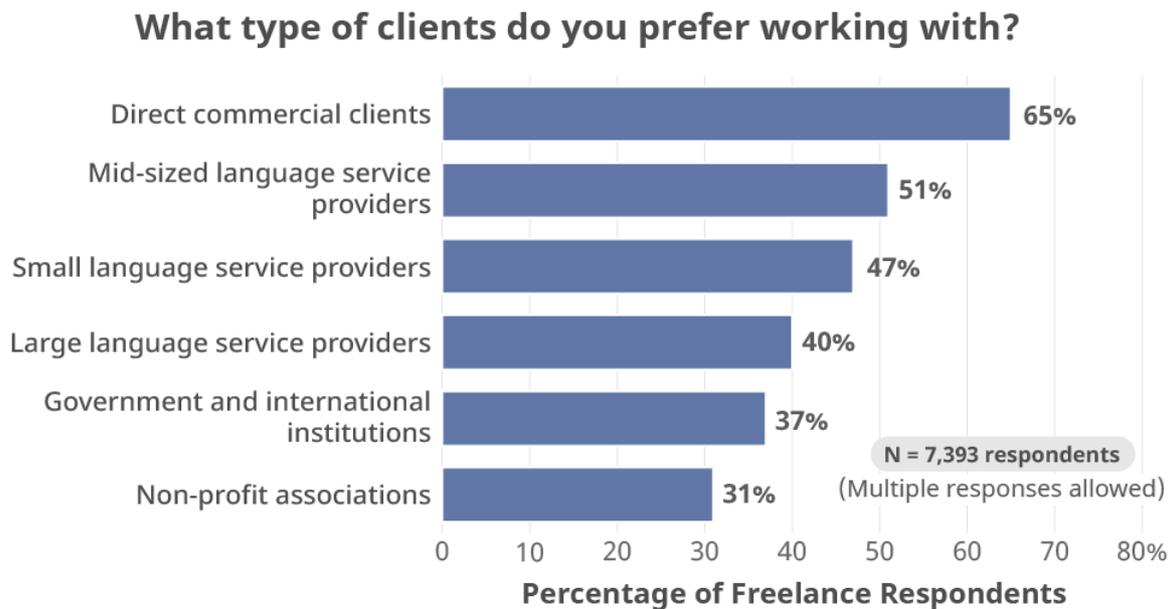
Clientele

Two questions that went into our survey design focused on the relationship with the buyer – "who are they?" and "how do linguists and clients find each other?" In this chapter, we review the distribution of work by client types, dive into specifics of working for direct clients and LSPs, and conclude with effective sales and marketing techniques.

Work Distribution

Where freelancers earn their revenue varies greatly based on sales focus.

- **LSPs.** About one in five respondents (21%) derive all their revenue from agencies. However, that's not the norm. Linguists working with LSPs get an average of 72% of their income from them.

- **Direct clients.** About one in six respondents (17%) earn all their income bypassing LSP intermediaries. Those doing so average 45% of their revenue working with direct clients.

- **Others.** This catch-all category includes government clients, academic institutions, individuals – whether friends, acquaintances, or private clients – and colleagues who subcontract work to them. Many also put publishing houses in this category. For those working with this bucket of "others," they derive an average of 35% of their revenue from them.

However, the balance of what work linguists prefer is different. About two-thirds (63%) favored direct commercial clients. When it comes to working with LSPs, size matters – 51% like working for midsized ones, 47% for small ones, and only 40% for the larger providers (Figure 18).

Figure 18: Linguists' Preferred Types of Clients

What type of clients do you prefer working with?

Client Type	Percentage
Direct commercial clients	65%
Mid-sized language service providers	51%
Small language service providers	47%
Large language service providers	40%
Government and international institutions	37%
Non-profit associations	31%

N = 7,393 respondents
(Multiple responses allowed)

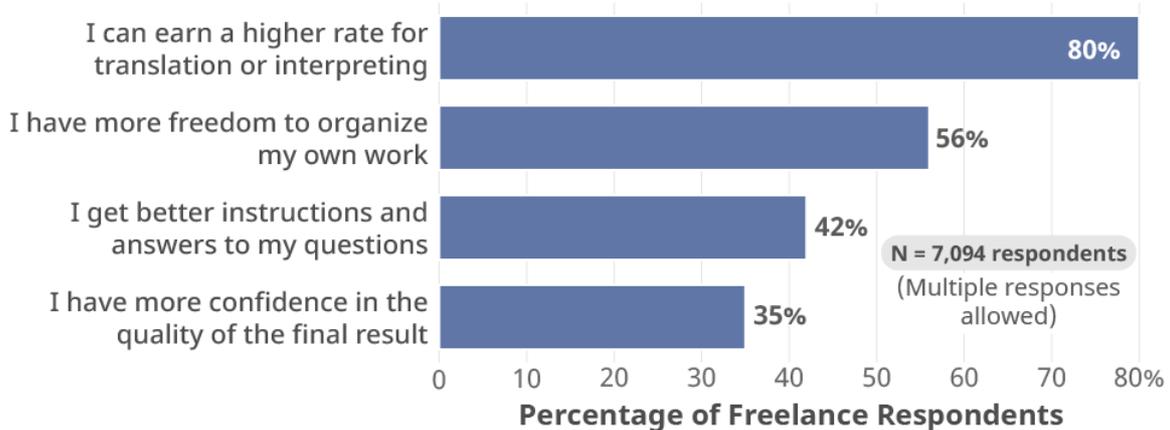**Percentage of Freelance Respondents**

Source: CSA Research

Working for Direct Clients

Why do linguists like to work for direct clients? Their main motive is the ability to earn higher rates (80% of respondents). They also like the freedom and ability to control the work more closely thanks to the loss of intermediaries (Figure 19).

Figure 19: Appeal of Working Directly for Clients

What appeals to you when working directly for clients?

I can earn a higher rate for translation or interpreting — **80%**

I have more freedom to organize my own work — **56%**

I get better instructions and answers to my questions — **42%**

I have more confidence in the quality of the final result — **35%**

N = 7,094 respondents (Multiple responses allowed)

0   10   20   30   40   50   60   70   80%

Percentage of Freelance Respondents

Source: CSA Research

Respondents brought up additional elements centered on the closer relationship they have with their direct customers – they contend that it leads to more collaborative and creative work. Linguists feel more valued and therefore get a greater sense of satisfaction. They like that they can go beyond translation and can act as a consultant who advises customers. They also find faster responses and payments.

> *"I like the 'personal touch' or the feeling of 'getting to know someone over the years,' which isn't the same with an agency."*

> *"Agencies tend to have very different requirements. It can often take a long time to read up on their requirements and adapt my work to suit them. Direct clients tend to be led more by me."*

> *"Closer involvement with the end product, more influence on processes and content, quicker response to queries, my contact knows the product better than a PM / is more qualified."*
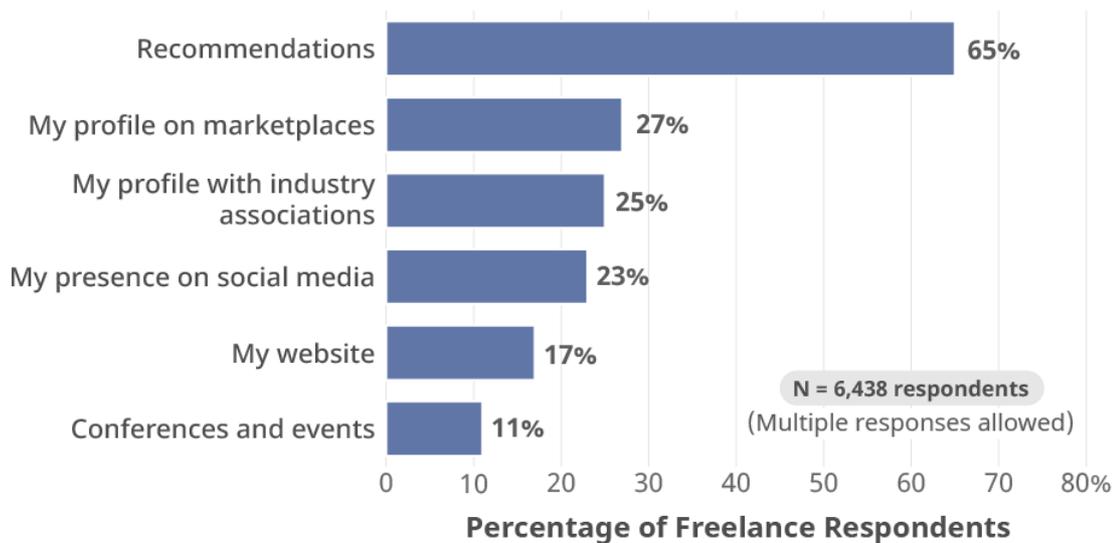
> *"Direct clients are more engaged in the translation process; it feels less like an assembly line. They understand and appreciate the challenges faced by translators."*

Prospective customers typically find linguists through recommendations (65% of respondents). They resort less to marketplaces (27%) or industry associations (25%) (Figure 20). Comments focused on the benefits of lists (chambers of commerce, consulate or embassy, alumni directory, and approved providers such as those found in courts) and marketplaces (in particular ProZ.com). For others, it's simply coincidence.

> *"I have found direct clients by pure coincidence (for example, I was a customer of one company, they found out my occupation, and now I translate for them. Or in another case, I had workmen in my house, they found out what I do, and the partner of one of them contacted me with some work)."*

Figure 20: Sources of End Clients as Customers

Where do prospective end clients typically find out about you?

Recommendations — 65%
My profile on marketplaces — 27%
My profile with industry associations — 25%
My presence on social media — 23%
My website — 17%
Conferences and events — 11%

N = 6,438 respondents
(Multiple responses allowed)
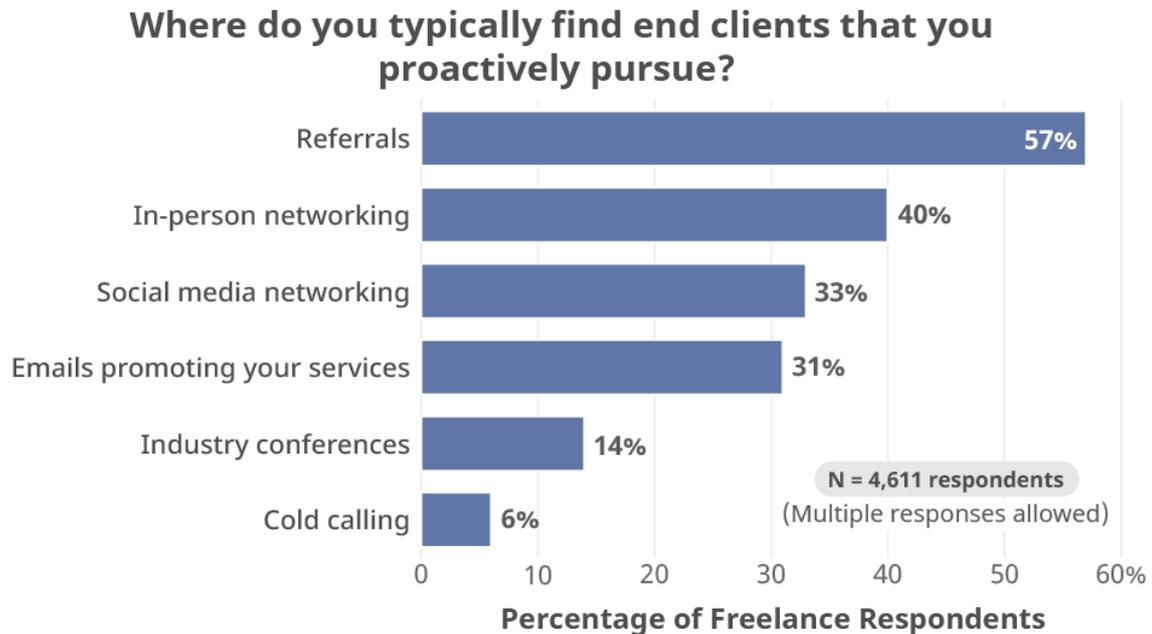
Percentage of Freelance Respondents

Source: CSA Research

> **Note:** *"Linguists with profiles in multiple channels may not be certain which ones are most effective because prospects may start with one channel (such as a social media profile) but approach them through another (such as a website)."*

Similarly, linguists looking for direct clients rely on word-of-mouth (57% cite referrals and 40% in-person networking) (Figure 21). They may also post and reply to ads such as on Craigslist.

Figure 21: Top Methods to Pursue End Clients

Where do you typically find end clients that you proactively pursue?

Method	Percentage
Referrals	57%
In-person networking	40%
Social media networking	33%
Emails promoting your services	31%
Industry conferences	14%
Cold calling	6%

N = 4,611 respondents
(Multiple responses allowed)

Percentage of Freelance Respondents

Source: CSA Research

Working for LSPs

Subcontracting for other LSPs brings more work for a great majority (71%), but also increases support with technology and personal development, However, they rate these additional benefits much lower than the greater availability of work through language service providers (Figure 22).

Figure 22: Appeal of Working through an Agency

What appeals to you when working through an agency?

I get more work that way	71%
I have access to language and technology support	29%
I have access to computer-assisted translation tools	28%
I have access to professional development and training	23%

N = 7,052 respondents
(Multiple responses allowed)

0   10   20   30   40   50   60   70   80%
Percentage of Freelance Respondents
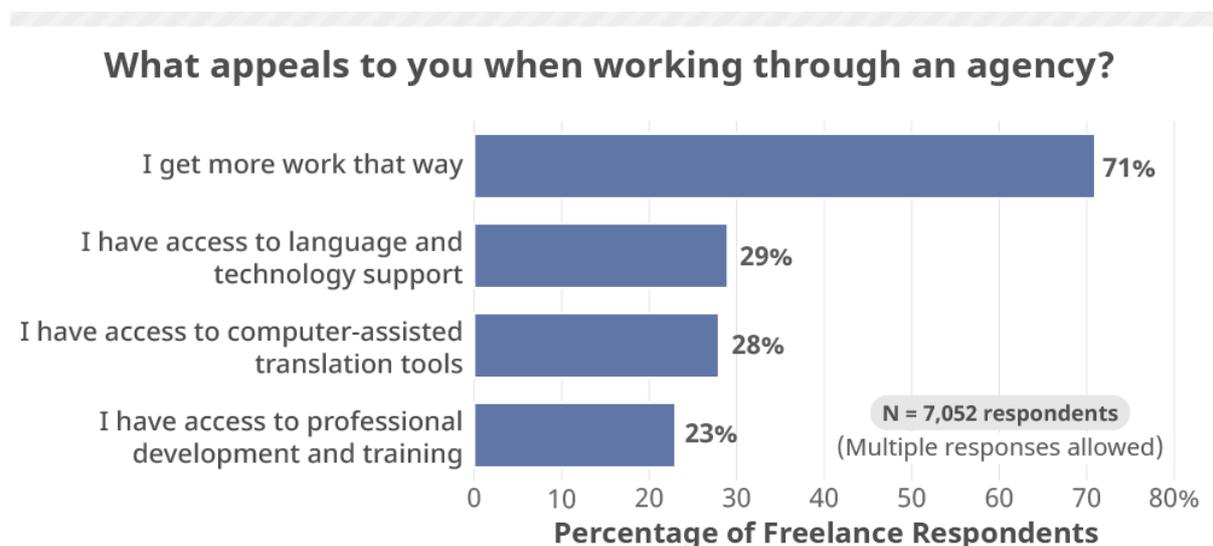
Source: CSA Research

Linguists' commentaries were rich in other elements they appreciate when working for agencies: the reduced liability; the bigger range of subject matter they get to tackle; the reduced need for sales, marketing, and administrative duties; the ability to decline work and take time off; the fact that projects require less pre- and post-processing; and the more frequent opportunity to collaborate with other linguists.

> *"A good agency does the project needs assessment, client education on the process and negotiating rates and deadlines. This means I don't have to spend unpaid time bidding on jobs or explaining the value of my services to prospective clients who may not be familiar with the translation process."*

> *"I like having a contact who remains an intermediary and who seeks to satisfy his client while sparing his provider. The relationship is more direct and frank than with an end customer who is less aware of the constraints and specifications of the profession."*

> *"Agencies help me minimize the time I spend on things I don't get paid for."*

> *"In my experience, direct clients are unpleasant to deal with - they have unreasonable expectations in nearly every regard because they do not*

> *understand the nature of translation, and they require a great deal of time to manage for a relatively small amount of work. And that's assuming that they are good clients. I love being shielded from the direct client and not having to engage in significant marketing, and consider the 35-50% that agencies take to be well worth outsourcing that part of my job."*
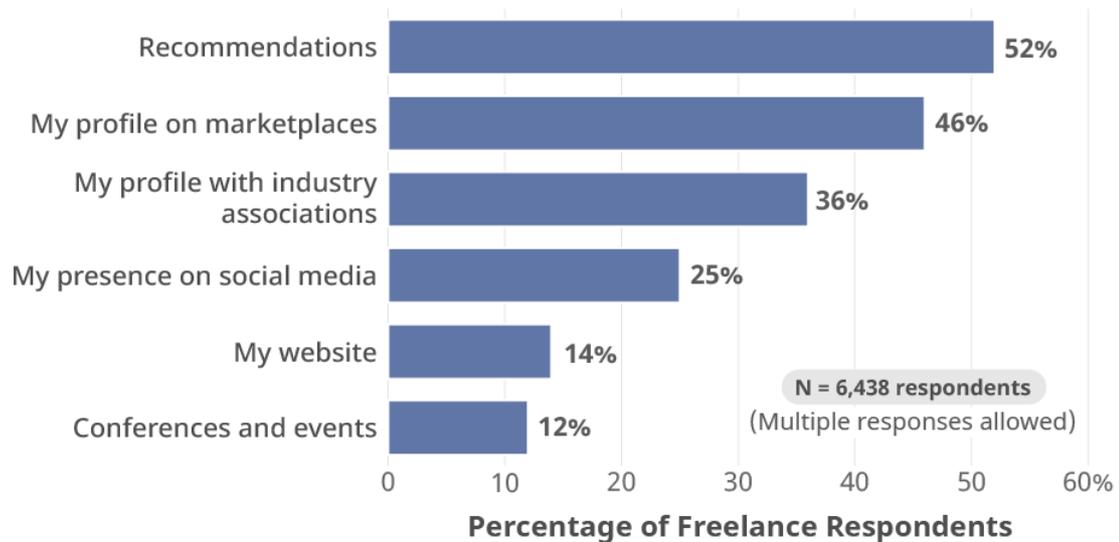
> *"Less hand-holding, less expectation that I must accept every job, less time taken in client education, easier to negotiate deadlines and deliverables."*

> *"There is much less project management work to do than with direct clients since jobs mostly include a less complex process (it's just: receiving file -> translating file -> delivering file)."*

Linguists report that language service providers find them through recommendations (52%) and marketplaces (46%) (Figure 23).

> **Note:** *We found a very high number of mentions of ProZ.com for this question. This may be in part skewed in their favor due to the big push the organization did to promote the survey.*
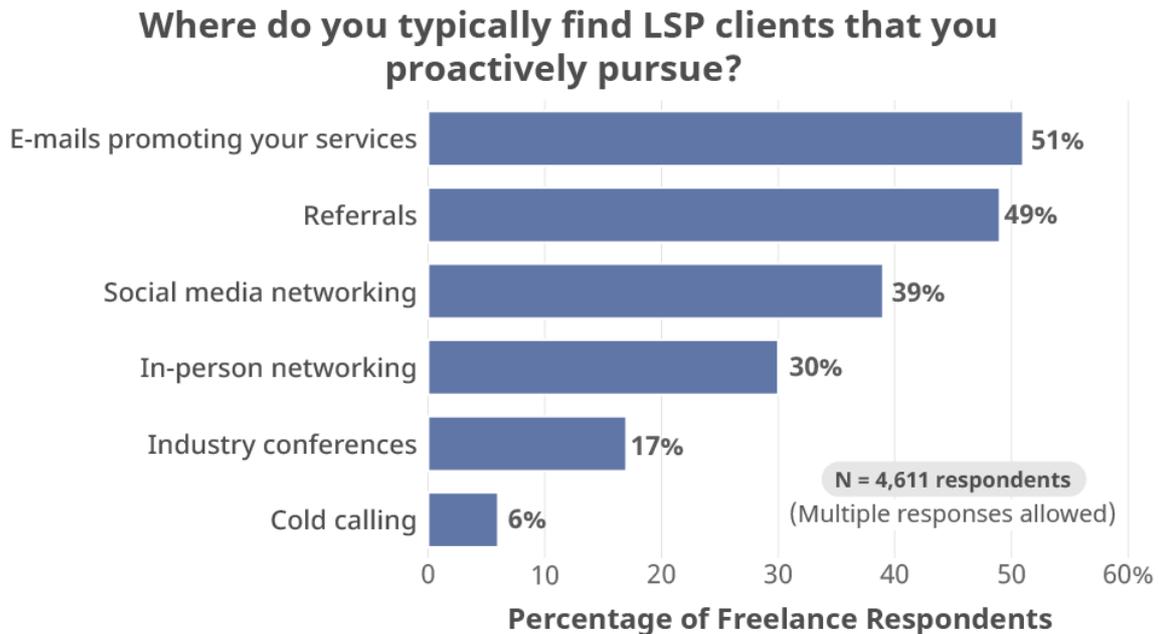
> *"Most of the time, I find them myself and write them "cold" or (usually) in response to a job offer."*

Figure 23: Sources of LSPs as Customers

Where do prospective LSPs typically find out about you?

Source	Percentage
Recommendations	52%
My profile on marketplaces	46%
My profile with industry associations	36%
My presence on social media	25%
My website	14%
Conferences and events	12%

N = 6,438 respondents
(Multiple responses allowed)

Percentage of Freelance Respondents

Source: CSA Research

Linguists use various means when seeking LSP clients – about one-half (51% of respondents) cited emails promoting their services as the most effective method, followed closely by referrals (49%). Social media networking also seems somewhat effective for 39% of our survey-takers (Figure 24). They mentioned applying to jobs directly on LSP websites and on marketplaces – whether language-centric or a general gig platform such as Upwork.
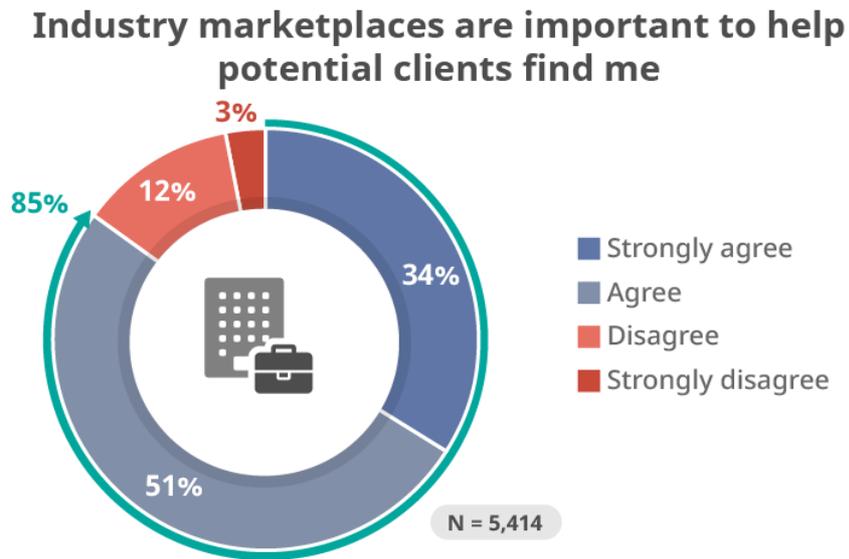
Figure 24: Top Methods to Pursue LSPs

Where do you typically find LSP clients that you proactively pursue?

Method	Percentage
E-mails promoting your services	51%
Referrals	49%
Social media networking	39%
In-person networking	30%
Industry conferences	17%
Cold calling	6%

N = 4,611 respondents
(Multiple responses allowed)

Percentage of Freelance Respondents

Source: CSA Research

Selling and Marketing

Building strong profiles on marketplaces is important for 85% of our sample (Figure 25). Marketplaces such as ProZ.com or Translators Café present effective ways to present capabilities and drum up interest with entities that recognize such outlets as databases of profiles to mine. Of course, these marketplaces hold greater recognition within the industry than outside of it because direct buyers often have no idea that they exist.

> **Note:** *Some of the strong responses tied to marketplaces may be linked to the fact that ProZ.com promoted the survey with their members.*
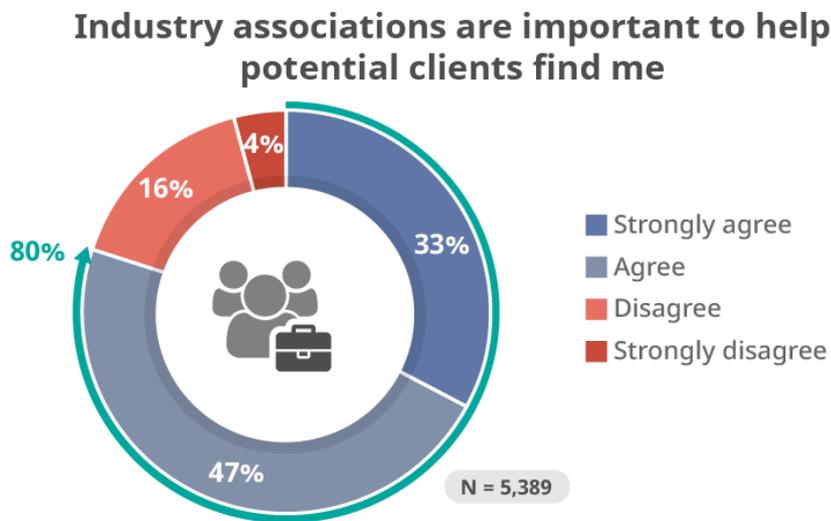
Figure 25: Importance of Industry Marketplaces

Industry marketplaces are important to help potential clients find me

- Strongly agree
- Agree
- Disagree
- Strongly disagree

3%
12%
85%
34%
51%
N = 5,414

Source: CSA Research

Becoming a member of a translator or interpreter association often grants the privilege of appearing in an online member directory. Four in five linguists (80%) value it is an important tool to help potential clients find them (Figure 26).

Figure 26: Importance of Associations

Industry associations are important to help potential clients find me

- Strongly agree
- Agree
- Disagree
- Strongly disagree

4%
16%
80%
33%
47%
N = 5,389

Source: CSA Research

Technology Usage

Linguists' relationship with technology is an important aspect of this profession. In this chapter, we dissect tech savviness, vendor portal usage, and perspectives on translation and interpreting technologies.

Tech Savviness

We started the series of questions with respondents describing their degree of tech savviness. About one-half (51%) feel they are comfortable with and ready to try new language software. In contrast, 7% don't feel very comfortable with it. The balance (42%) fell somewhere in between (Figure 27).

Figure 27: Linguists' Degree of Tech-Savviness
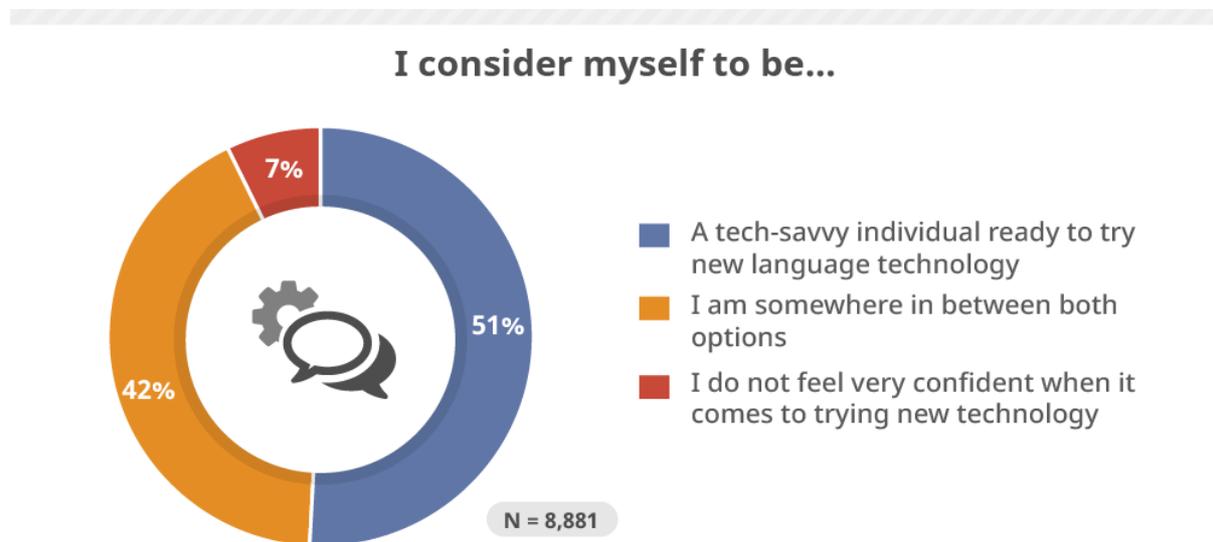
Source: CSA Research

The translation industry is continuously adding new software to support linguist work, thereby making the profession very tech-oriented. This reality requires freelancers to keep up with technology advances and learn new products on their own. The pace of technology change provides another motivation for working for LSPs – when they're faced with a new tool to master, linguists can more freely ask questions about the software than when they contract with direct clients.
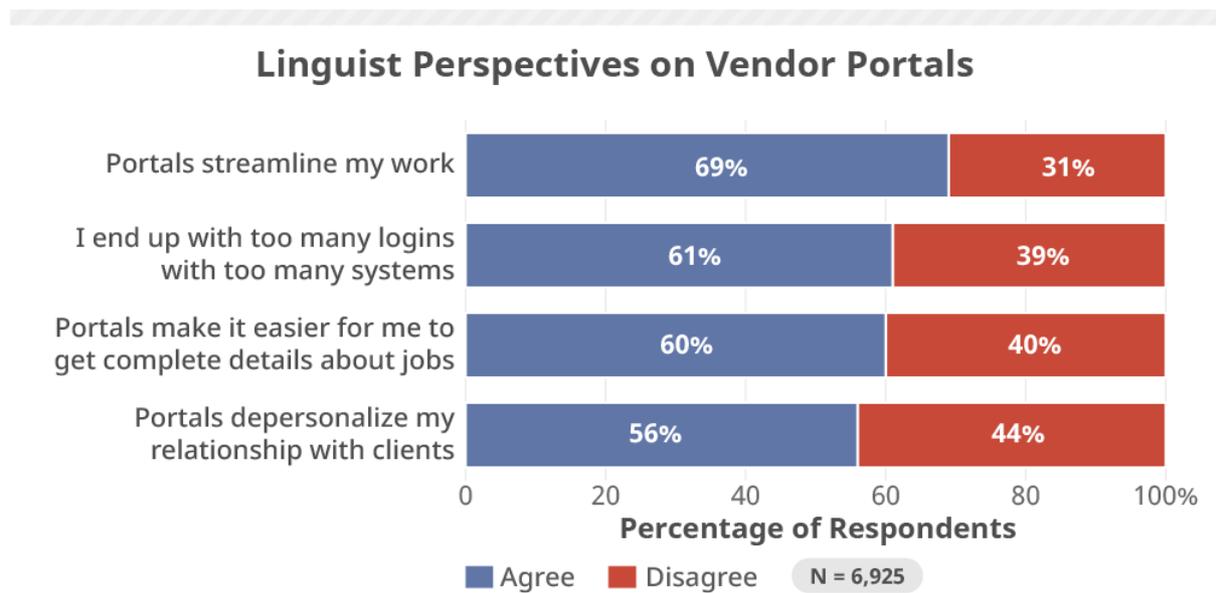
Vendor Portals

We inquired about the number of portals that linguists used to retrieve jobs, deliver files, and submit invoices. We asked them to count each platform for which they need separate login credentials. Only 11% of respondents reported using no portal at all. For the balance, the average was five logins. The maximum a linguist reported was 368. We suspect many linguists under-reported this number and actually log into many more platforms than five.

We probed linguists for their thoughts on portals. More than two-thirds (69%) believe it streamlines their work, but 61% find themselves with too many logins (Figure 28).

> **Note:** In analyzing free-text answers to the questions, we observed that quite a few respondents extended the meaning of vendor portals to also include marketplaces and online computer-assisted translation platforms.

Figure 28: Linguist Perspectives on Vendor Portals

Linguist Perspectives on Vendor Portals

	Agree	Disagree
Portals streamline my work	69%	31%
I end up with too many logins with too many systems	61%	39%
Portals make it easier for me to get complete details about jobs	60%	40%
Portals depersonalize my relationship with clients	56%	44%

Percentage of Respondents

■ Agree   ■ Disagree   N = 6,925

Source: CSA Research

Overall 1,600 linguists contributed their thoughts about vendor portals. From our analysis, the top issue that should concern portal developers is the recurrent complaint that systems range from great and beneficial to terrible due to downtime and

counterintuitive experience. They specifically mentioned the challenge with accepting jobs in apps that require a lot of communications bandwidth when trying to review jobs from their mobile phone in low connectivity areas.

What they like about portals tends to be the auto-billing features, which in some cases can reduce accounting work. However, they often find the tools impersonal and prefer to handle questions through other means of communication with project managers to get more detailed information and further build the relationship with their customers.

Some respondents' comments about portal usage.

> *"I prefer portals to anything else. Everything is well organized. There is total transparency. Everybody involved is usually fast to respond. I can pick and choose projects more easily. I can get on with my job instead of wasting time on emails and personal communications. The lack of personal contact makes things more professional usually."*

> *"Companies where all interaction is now via a portal are ones I no longer work with, as they have become so depersonalized and the effort to correct incorrect settings/deadlines/rates for jobs and determine accurate information was such a waste of time that I happily work more with companies who have efficient and professional PMs who interact promptly by e-mail."*

> *"Another option that some agencies offer through their portal is automatically calculating and issuing one large invoice at the end of each month, which saves a lot of time and ensures transparency."*

> *"A good portal would be great and of use. However, the ones I've seen and used are substandard and complicate matters rather than assist. I still end up emailing after returning files via portals. So it just duplicates things rather than simplifying."*

> *"A well-organized portal that is not too cumbersome can be a good thing, though they ideally shouldn't distance you from the project managers/depersonalize the relationship too much. However, the vast*

> majority of portals I have experience with are cumbersome and aren't suited well for their purpose."

> "Although I quite enjoy working with portals, I do worry if there's a system hiccup whether delivery was successful. I dislike the automated aspect because I don't feel I build as strong a relationship with my customer and they don't always provide all the answers / reference materials etc., if I have questions. I find that remembering all my different clients' individual delivery processes and log in information quite frustrating."

> "It would be simpler if all the portals operated in the same way. I like to work with a portal, but when I have to use several different portals, one for each client, it becomes difficult to remember the specific characteristics and we make mistakes."

> "I have a client (an agency) where I have to register in THREE different portals: one for the actual job, one for invoicing, and then another one to initiate the transfer of money to my account. The result: I am currently thinking about ending the work relationship - these portals make it too complicated and time consuming for me."

> "I find that I spend a lot of unpaid time trying to find my way through these systems."
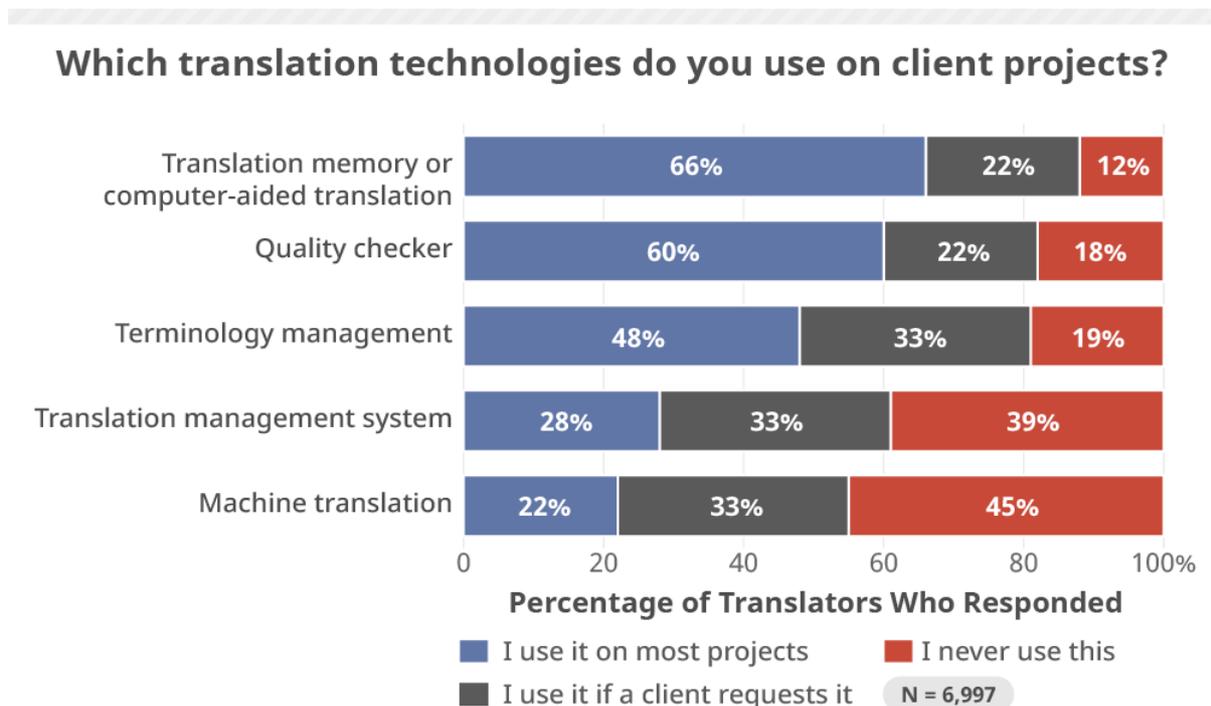
> "I generally see them as a way for agencies to reduce costs on their end and to push some of the administrative burden on freelancers."

Translation Technology

Respondents told us about their usage of various translation-related technologies. Naturally, translation memory (TM) and computer-assisted translation (CAT) rose to the top, used on most projects by two-thirds (66%) of respondents. Next came quality checkers (60%) and terminology management tools (48%). Based on our research of such tools, we suspect this latter number overstates the usage of pure terminology management and likely includes linguists that use a glossary lookup tool built into a CAT

environment. Machine translation came to the bottom of the list, but the numbers are interesting in that they show that one in five translators (22%) use it even when clients don't ask for it (Figure 29). This demonstrates the increasing efficiency of machine translation for translator productivity. Note however that the results may not reflect low-level opportunistic use of MT as a terminology look-up tool or cases where linguists use it as a tool for occasional sentences.

Figure 29: Translation Technologies Used

Which translation technologies do you use on client projects?

	I use it on most projects	I use it if a client requests it	I never use this
Translation memory or computer-aided translation	66%	22%	12%
Quality checker	60%	22%	18%
Terminology management	48%	33%	19%
Translation management system	28%	33%	39%
Machine translation	22%	33%	45%

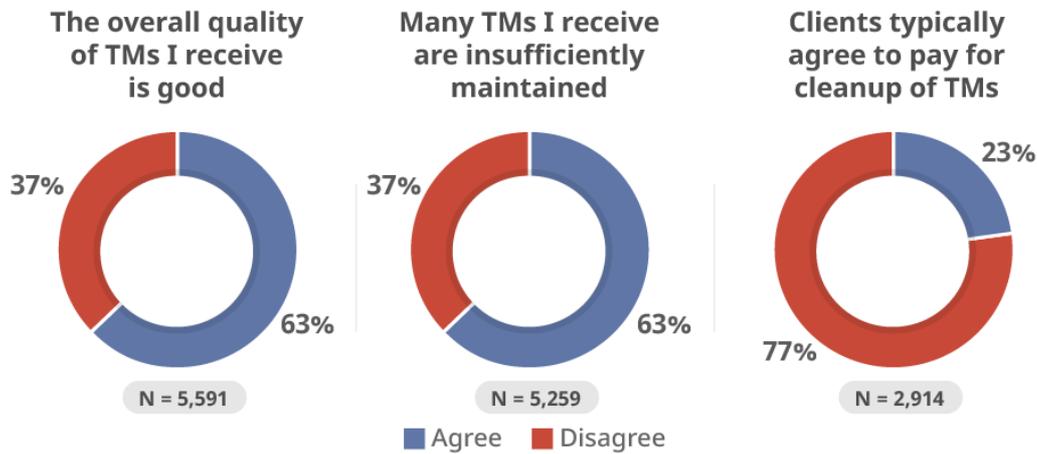**Percentage of Translators Who Responded**

N = 6,997

Source: CSA Research

Translators overall find that the quality of translation memories they receive is good (63% of respondents). Simultaneously, they feel that many TMs are insufficiently maintained (63% also). White this may seem contradictory, it can simply be that the overall quality is acceptable, but that over time TMs don't get the care they should to remain in top condition. This ties to the next most frequent comment where only 23% of respondents say that clients typically agree to pay for the cleanup of translation memories (Figure 30). It can be a sore situation for linguists due to the fact they always have to remember all the "fixes" to make on the fly as they work.

Figure 30: Linguist Perspectives on Translation Memory Maintenance

Linguist Perspectives on Translation Memory Maintenance

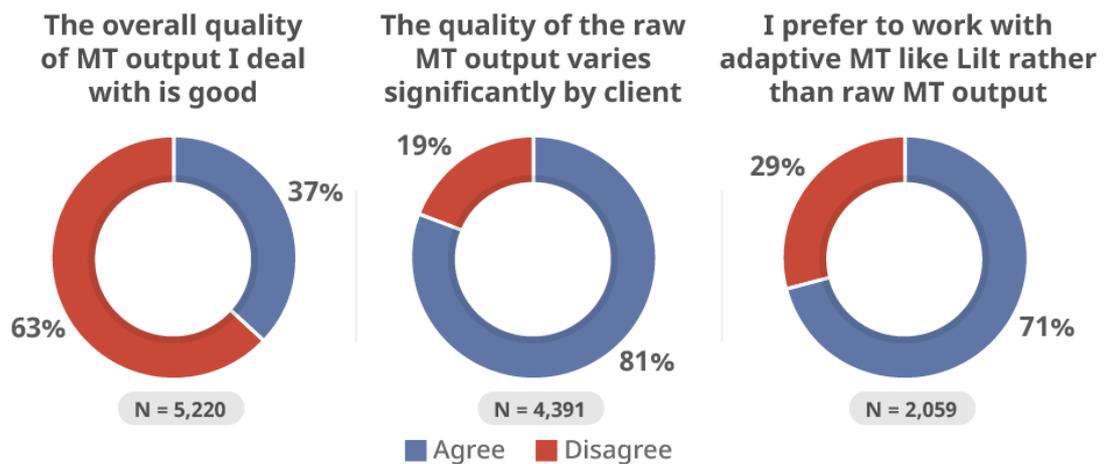| The overall quality of TMs I receive is good	Many TMs I receive are insufficiently maintained	Clients typically agree to pay for cleanup of TMs
37% / 63%	37% / 63%	23% / 77%
N = 5,591	N = 5,259	N = 2,914

■ Agree ■ Disagree

Source: CSA Research

Of those linguists that use machine translation, a little more than one-third (37%) find that its overall output is good. However, 81% experience sharp variations in the quality of the raw MT output by clients. Translators who use MT predominantly prefer to work with adaptive systems like Lilt rather than raw MT output (71%) (Figure 31).

Figure 31: Linguist Perspectives on Machine Translation

Linguist Perspectives on Machine Translation

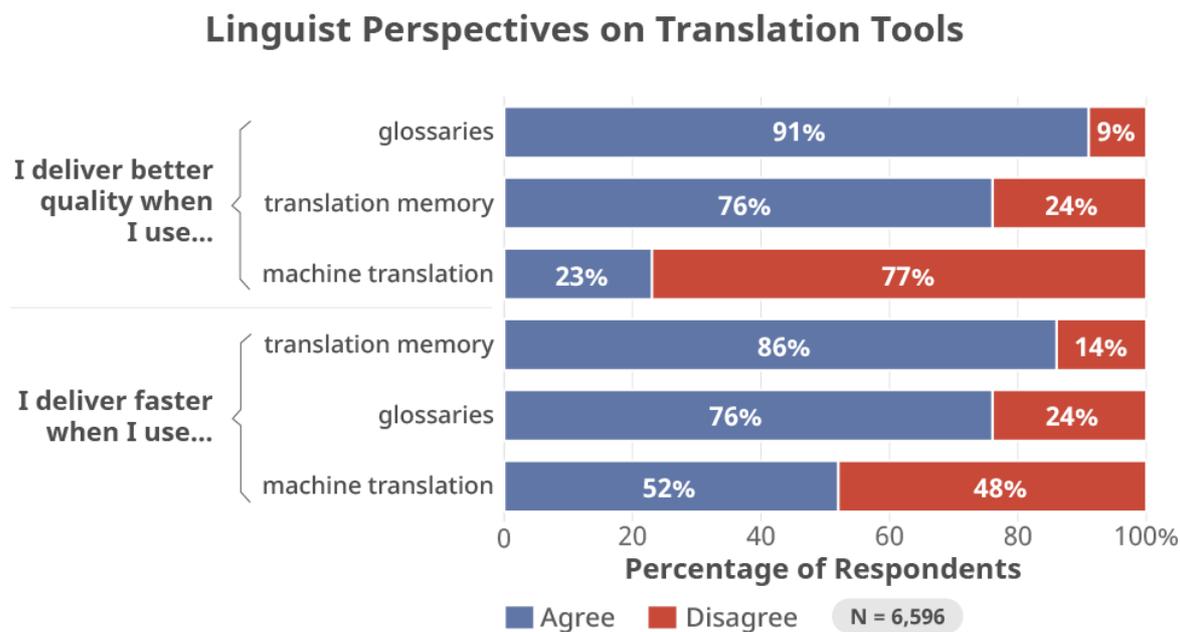| The overall quality of MT output I deal with is good	The quality of the raw MT output varies significantly by client	I prefer to work with adaptive MT like Lilt rather than raw MT output
37% / 63%	19% / 81%	29% / 71%
N = 5,220	N = 4,391	N = 2,059

■ Agree ■ Disagree

Source: CSA Research

"Change is inevitable in any industry, and in this day and age, it is speeding up. Fifty years ago, translators would have their hand-written translations typed up by secretaries. Thirty-five years ago, translators would type their translations on typewriters. Computers changed the industry, then came CAT tools (after it was determined that MT could not deliver what it promised at the time). But eventually, MT will be usable for many projects. Plus, more and more people speak several languages fluently. The landscape is changing. But that is okay. Change IS the only constant."

"DeepL is incredible. For my language pair, it blows all other MTs away. If the quality gets any better, I will be out of a job."

Translators value glossaries in their contribution to quality deliverables the most (91% of respondents delivered better quality when they used them), versus 76% for translation memory. Interestingly, nearly one-quarter of linguists (23%) deliver better quality when they use machine translation – a contrast to the typical opinion that the final product of MT remains substandard compared to human translations.

Translation memory enables faster deliveries for 86% of respondents, followed by glossaries (76%), and MT (52%). Linguists still rate machine translation as a retardant compared to other translation efficiency tools, most likely tied to the fact that MT's output isn't consistently good enough to speed up translations (Figure 32).

Figure 32: Linguist Perspectives on Translation Tools

Linguist Perspectives on Translation Tools

	Agree	Disagree
I deliver better quality when I use... glossaries	91%	9%
translation memory	76%	24%
machine translation	23%	77%
I deliver faster when I use... translation memory	86%	14%
glossaries	76%	24%
machine translation	52%	48%

Percentage of Respondents

■ Agree   ■ Disagree   N = 6,596

Source: CSA Research

We also inquired about a relatively new type of technology that holds promise for translators: automatic content enrichment. ACE parses source and target text, creates links to relevant external resources, and can supply additional information such as terms, concepts, dates, or products ("TechStack: Automated Content Enrichment"). It makes content more intelligent for the benefit of whoever interacts with it, including linguists. For example, it can provide links to articles, images, or online data sources without requiring the translator to leave the translation environment to research a concept.

About three-quarters of respondents (74%) had never heard of it and just 3% had a chance to use it (Figure 33). Even so, their comments about usage may imply that they correlated it to translation memory or machine translation functionality and not real ACE. This is a technology that linguists need to keep an eye out for because it has the potential to both improve their work or add much more complexity to it if not deployed well.

**Figure 33: Linguists and Automated Content Enrichment**
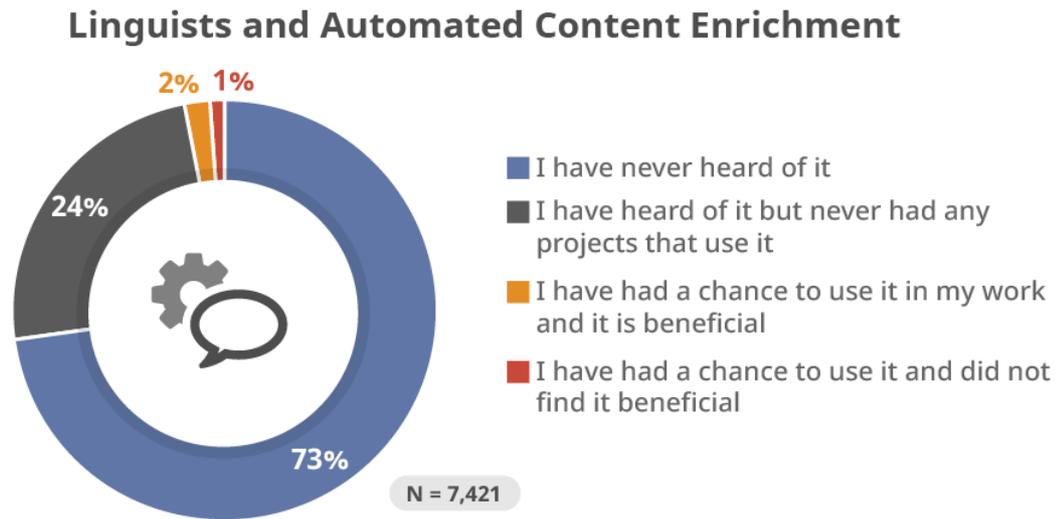
Source: CSA Research

> *"I have found that certain implementations can harm and mangle tags, create a mess in CAT interfaces and generally become too obtrusive when attempting to localize otherwise simple pages and documents. Furthermore, there is no premium generally applied to the cost of services for managing the issues that arise, and I have found that clients abuse the per-word estimate process by ignoring the content enhancements that must also be dealt with in a project by the translators and editors."*

Interpreting Technology

Interpreters shared with us the technology they commonly use on client assignments. Over-the-phone (OPI) platforms top the list. Numbers dropped after that depending on the type of interpreting that the linguist performs. The interesting finding in this data is the fact that 11% of respondents reported using, at least occasionally, machine interpreting with customers (Figure 34). We suspect they use it in parallel to their own work as a safety net if they miss something as a sort of "rewind" button.
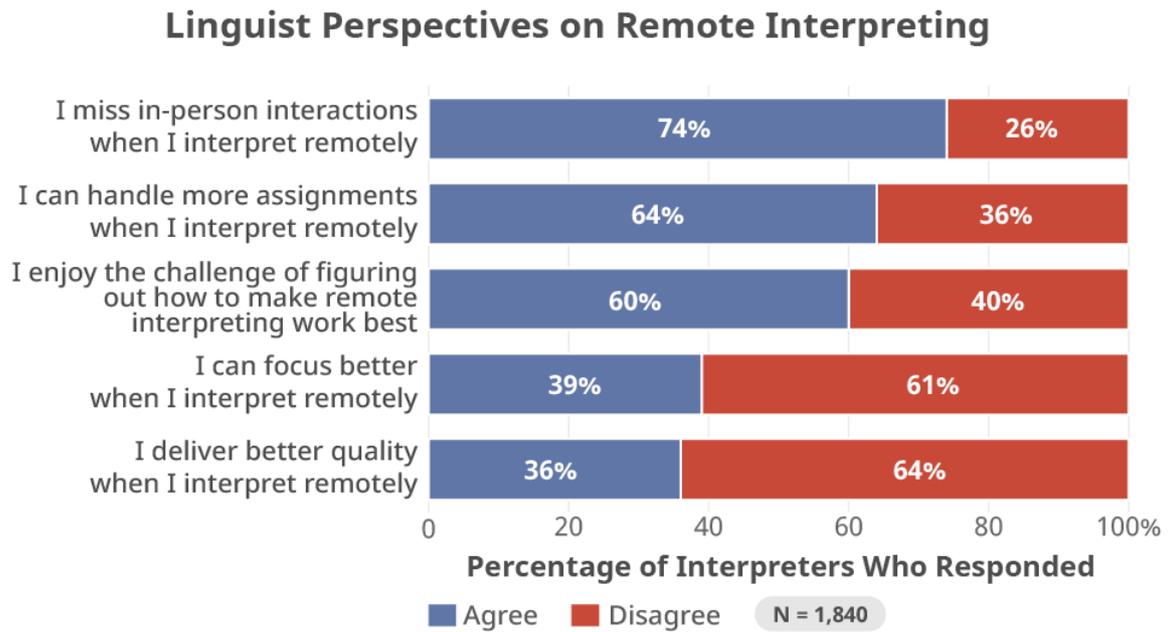
Figure 34: Interpreting Technology Used

Which interpreting technologies do you use on client assignments?
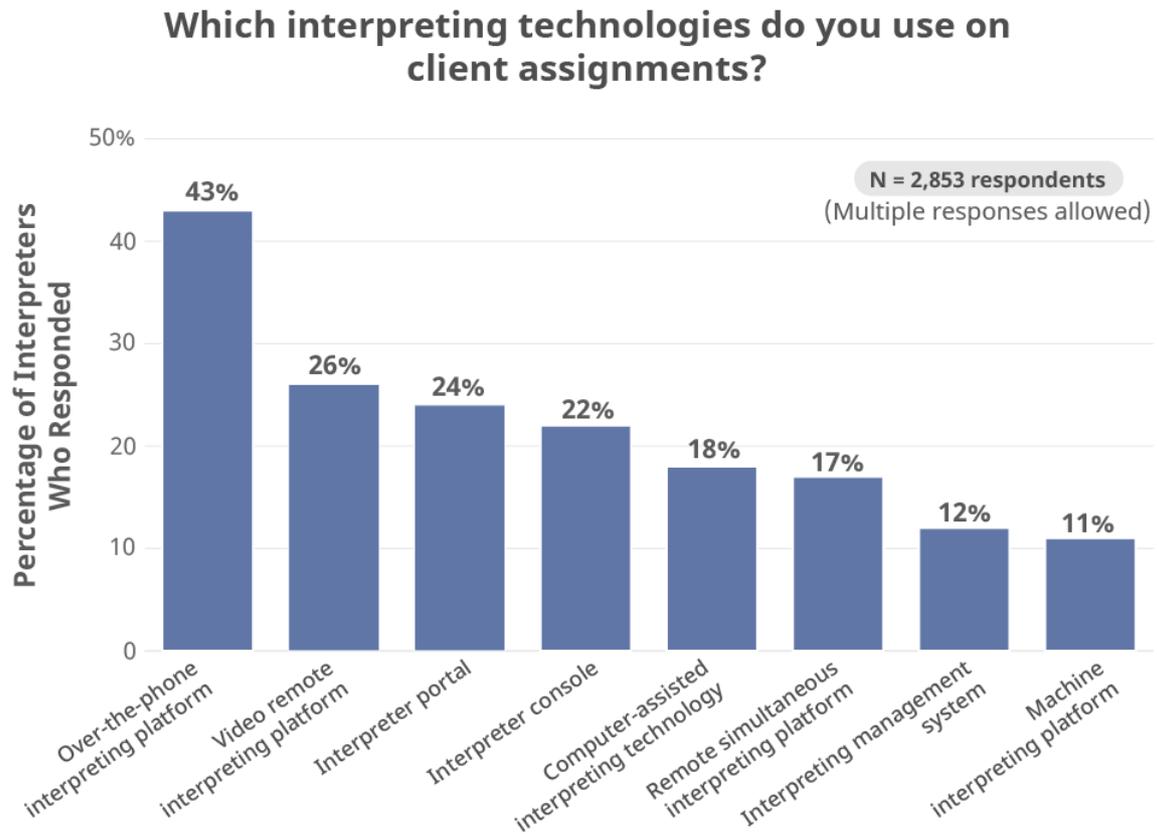
Source: CSA Research

Figure 6 showed that linguists overwhelmingly prefer to interpret in person. Figure 35 investigates further into why. Nearly three-quarters (74%) miss in-person interactions. However, remote interpreting has its pros – 54% can handle more assignments remotely and 60% enjoy the challenge of figuring out how to make remote interpreting work best. After that, remote work reveals some greater challenges with only 39% who focus better and 36% who deliver quality in such work setups.

Figure 35: Linguist Perspectives on Remote Interpreting

Linguist Perspectives on Remote Interpreting

Statement	Agree	Disagree
I miss in-person interactions when I interpret remotely	74%	26%
I can handle more assignments when I interpret remotely	64%	36%
I enjoy the challenge of figuring out how to make remote interpreting work best	60%	40%
I can focus better when I interpret remotely	39%	61%
I deliver better quality when I interpret remotely	36%	64%

Percentage of Interpreters Who Responded

■ Agree ■ Disagree   N = 1,840

Source: CSA Research

Income from Language Services

Is solely translating or interpreting enough to make a good living? This chapter explores: 1) linguist earnings; 2) the payment terms tied to these earnings for freelancers; 3) and issues tied to rate negotiations.

Earnings

We asked linguists to share with us their how much money they earn from language services such as translation and interpreting but excluding services such as project management or consulting. For in-house linguists, we asked them to simply select their salary range.

On average, linguists earn US$29,000 per year before taxes. One in five respondents (21%) earn less than US$5,000 annually, making translation a source of supplemental income more than a career – as was confirmed earlier in the career focus findings. Nearly one-half (49%) earn less than US$20,000 annually. However, at the other end of the spectrum, 14 respondents declared earning more than US$200,000 from their language services.

In Figure 36, the height of the bubble shows the number of respondents that fell in a certain revenue bracket and the size of the bubble the percentage of respondents they represent.

In their comments, linguists reported vastly changing earnings year over year. Some had seen increases but quite a few reported declines. Among others, it's the result of personal decisions to reduce work; lower rates while still processing the same volume of jobs; and currency exchanges that disadvantage some linguists. For those that earn low revenue from their language services, many reported still being new to the profession, planning it that way to accommodate for other roles, or because it's just extra gravy on top of their pension.

Figure 36: Linguists' Annual Income
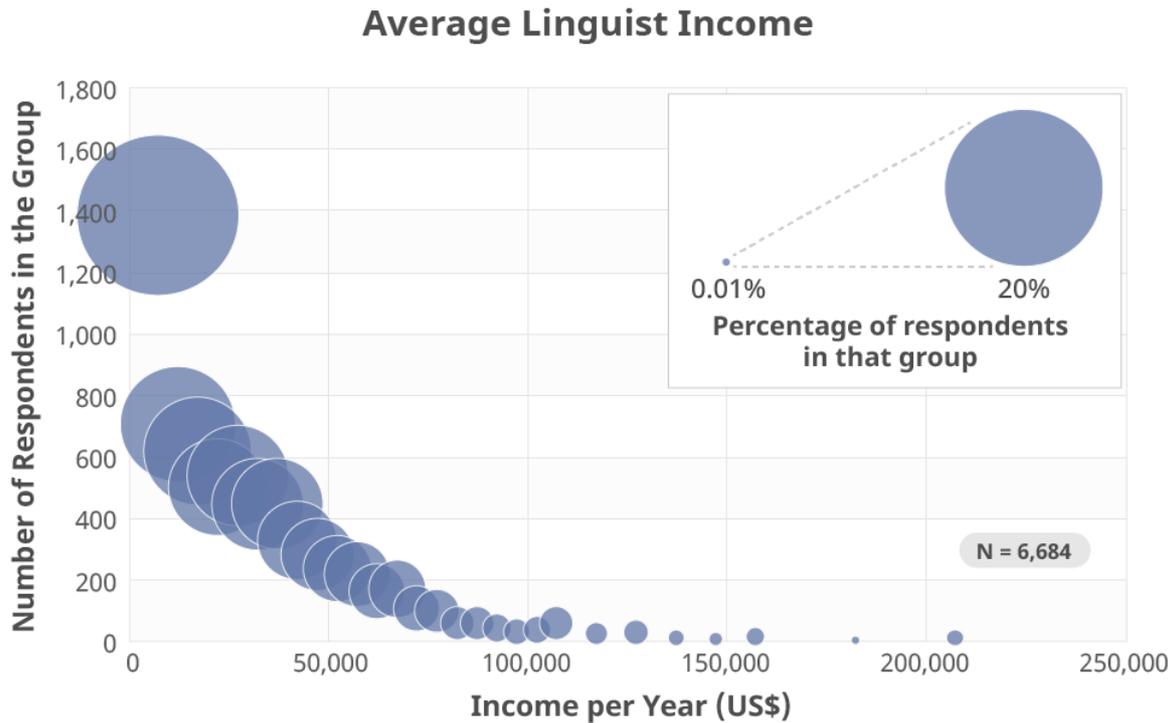
Source: CSA Research

Here are a few representative comments regarding income hardships they encounter:

> *"Alas, I earn too little to allow a decent life. But what would we not do for the passion and love of the profession?"*

> *"It's no longer a profession that allows you to live well."*

> *"It's a declining business. I still make decent money because I am a specialist (finance, tech, agriculture). I am setting up a new, completely unrelated business and hope to stop translating as this business replaces my current income."*
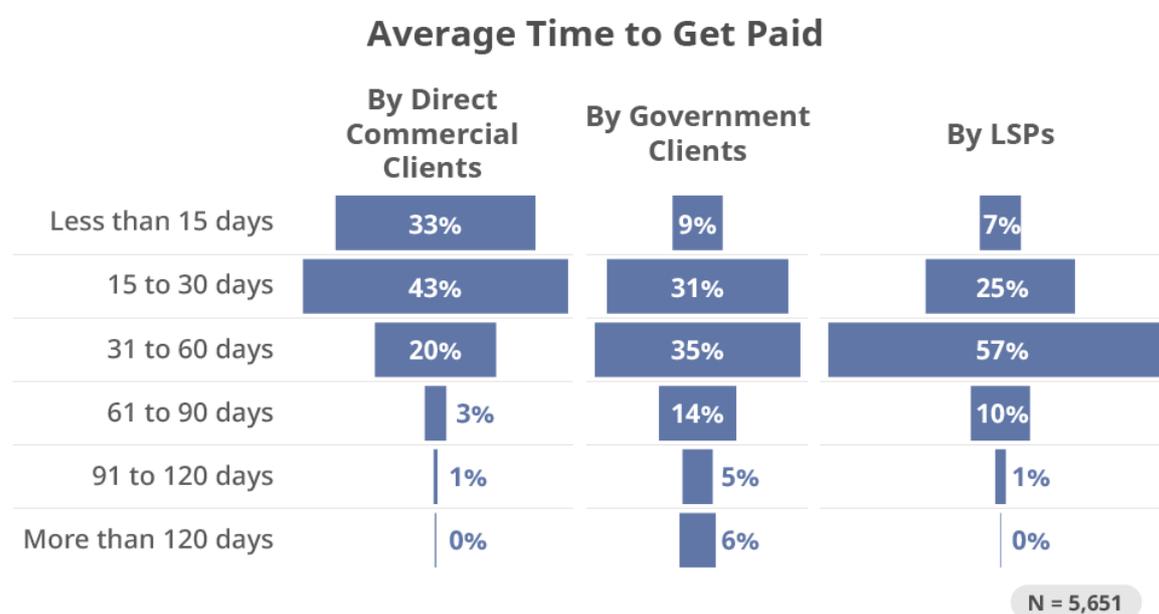
> *"I wish I could survive with the salary earned by being an interpreter. But with such low salary, it is hard not to have another job on the side. The cost of insurance, union, gas, parking fees (especially in hospitals) add too much."*

> *"It is nearly impossible to break into this market. I know I am good, and the demand is out there, but trying to break into it is more difficult than ever."*

Payment Terms

Freelancers must worry about getting paid when considering their compensation package. Payment terms can vary by client type. Seemingly, direct commercial clients are the ones most likely to pay in under 15 days – however, this may depend on client profile and bill amount. Government clients are the ones paying in the longest time frames. The bulk of language service providers pay between 31 and 60 days (Figure 37). We estimate that the average direct client pays in less than one-half the time it takes a government client to pay.

Figure 37: Average Time to Get Paid

Average Time to Get Paid

	By Direct Commercial Clients	By Government Clients	By LSPs
Less than 15 days	33%	9%	7%
15 to 30 days	43%	31%	25%
31 to 60 days	20%	35%	57%
61 to 90 days	3%	14%	10%
91 to 120 days	1%	5%	1%
More than 120 days	0%	6%	0%

N = 5,651
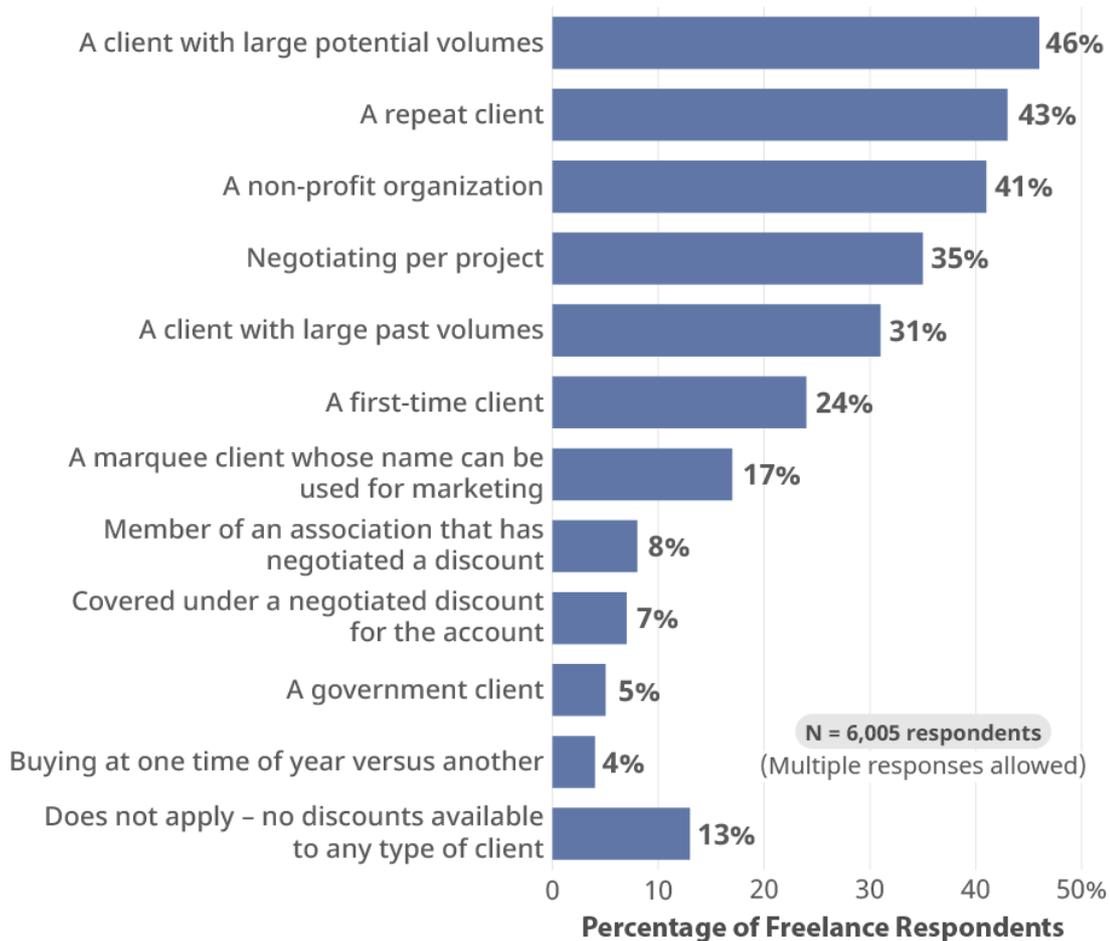
Source: CSA Research

Rate Negotiations

Another aspect tied to linguist compensation is how frequently they work below their standard rates. Freelancers shared with us the scenarios in which they might give a

client a discount. High volumes and repeat work are what they crave. Only 13% of respondents claim never to give any discounts. Their comments highlight the fact that many frown upon them. Many would rather do pro bono work than discount (Figure 38). Scenarios when they more willingly lower their prices include clients that pay upon delivery, individuals such as students or refugees, projects with very generous timelines, situations where they made an error, and project managers they like and who have their back.

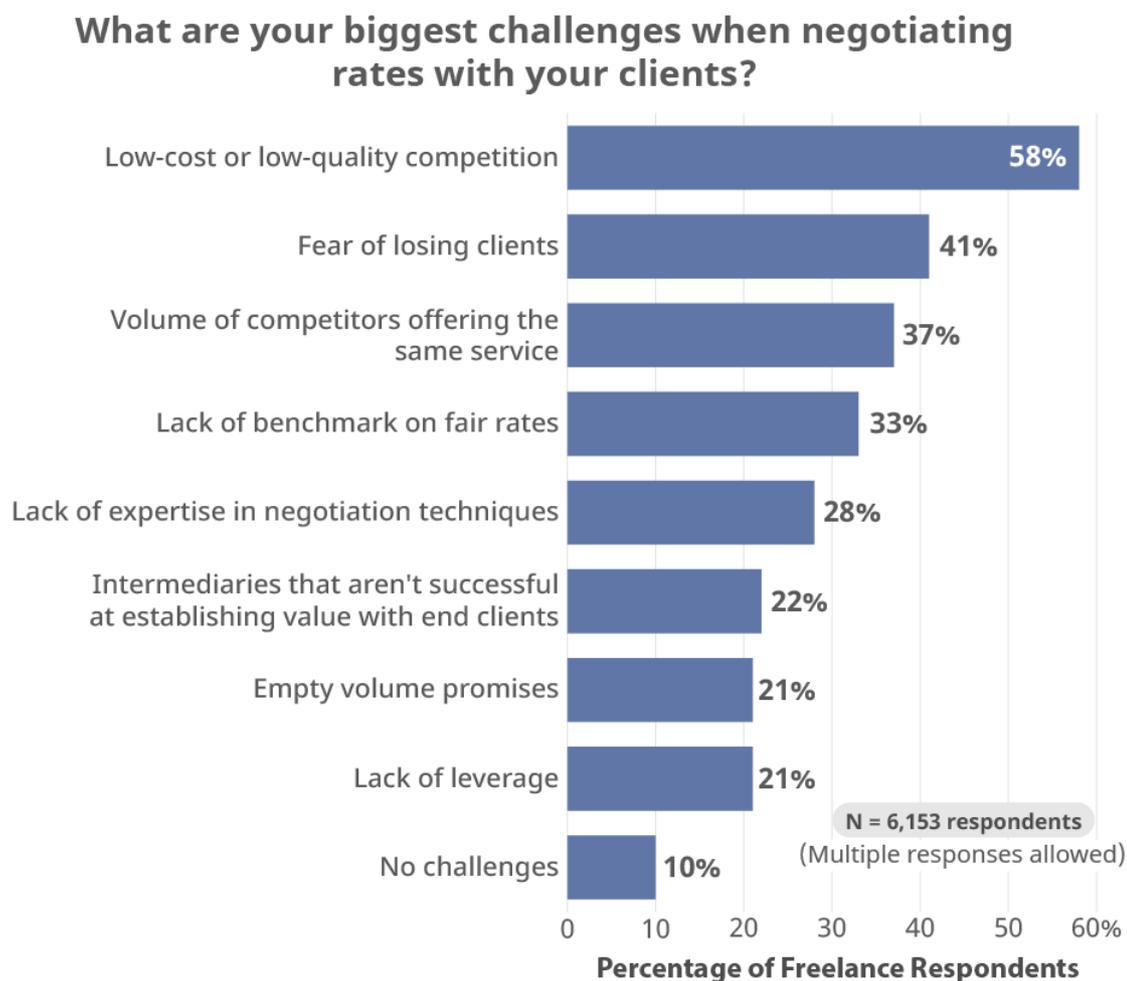**Figure 38: Scenarios Where Linguists Might Give a Client a Discount**

Scenarios Where Linguists Might Give a Client a Discount

Scenario	Percentage
A client with large potential volumes	46%
A repeat client	43%
A non-profit organization	41%
Negotiating per project	35%
A client with large past volumes	31%
A first-time client	24%
A marquee client whose name can be used for marketing	17%
Member of an association that has negotiated a discount	8%
Covered under a negotiated discount for the account	7%
A government client	5%
Buying at one time of year versus another	4%
Does not apply – no discounts available to any type of client	13%

N = 6,005 respondents
(Multiple responses allowed)

Percentage of Freelance Respondents

Source: CSA Research

The biggest challenge when negotiating rates with clients comes from low-cost or low-quality competition (58% of respondents) because it makes it difficult for linguists to stand their ground. The second most selected response was the fear of losing clients (41%), which leads translators and interpreters to make concessions in the hope of continued future work (Figure 39).

Figure 39: Biggest Negotiation Challenges

What are your biggest challenges when negotiating rates with your clients?

Low-cost or low-quality competition	58%
Fear of losing clients	41%
Volume of competitors offering the same service	37%
Lack of benchmark on fair rates	33%
Lack of expertise in negotiation techniques	28%
Intermediaries that aren't successful at establishing value with end clients	22%
Empty volume promises	21%
Lack of leverage	21%
No challenges	10%

N = 6,153 respondents
(Multiple responses allowed)

Percentage of Freelance Respondents

Source: CSA Research

Free-text answers revealed issues such as the fact that the competition is too high to manage to negotiate with agencies. Overall, it's the lack of understanding from clients about the nature of the work and freelancing conditions that frustrates them.

> *"Client ignorance - not understanding that I pay a higher tax rate and don't get health insurance through an employer/the state like they do. All expenses are paid by me not an employer. I get none of the benefits they do through their employer (paid vacation and family leave), etc."*

> *"Clients do not realize that more work means longer working hours for me. I do not want to work harder for less pay. It is not comparable to manufacturing more T-shirts at a lower price, but that is how clients treat translators. As if they are doing us a favor."*

Volunteer Work

We conducted the survey in partnership with Translators without Borders. As a result, we asked a series of questions about volunteering done by linguists, which we are sharing with everyone.

Linguists are generous with their time – 72% reported having performed volunteer (unpaid) translation or interpreting in the past (Figure 40).

Figure 40: Frequency of Volunteer Language Services

**Have you ever performed volunteer (unpaid) translation or interpreting?**

28%
No

72%
Yes

N = 7,523
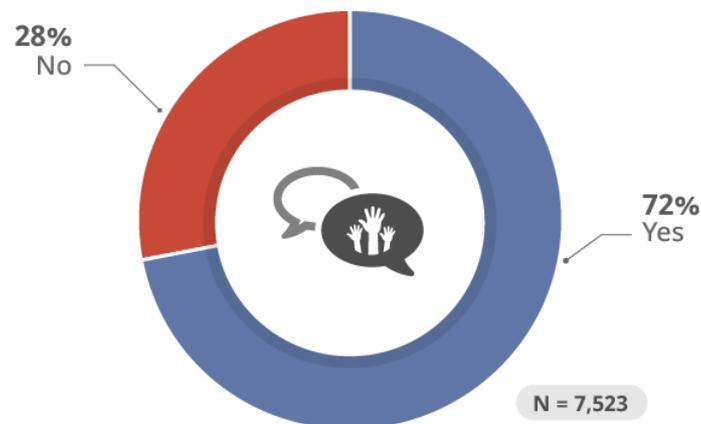
Source: CSA Research

We inquired whether linguists ever translated or interpreted for development and/or humanitarian organizations. Fully 44% of the current respondent pool for the survey have done so – however, many commented that some of that work may have taken place much earlier in their careers (Figure 41).

Figure 41: Experience with Development or Humanitarian Organizations

Have you ever translated or interpreted for development and/or humanitarian organizations?

56%
No

44%
Yes

N = 7,525
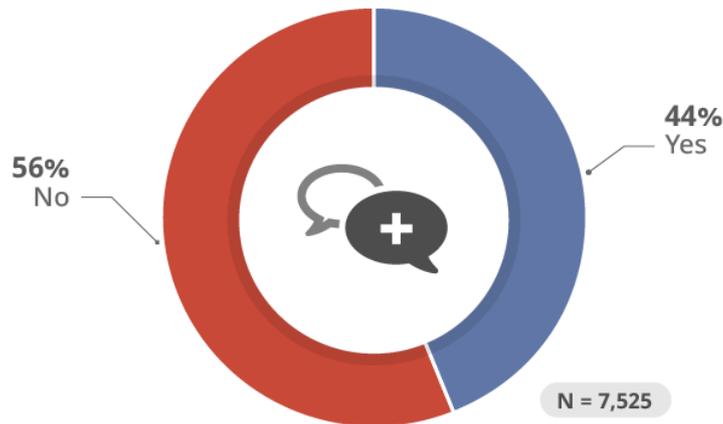
Source: CSA Research

Linguists cited a diverse list of organizations. Translators without Borders was the most common entry – a predictable fact since the organization heavily promoted the survey to their volunteers. But we also found a plethora of other humanitarian organizations including Amnesty International, Caritas, Global Voices, Greenpeace, Oxfam, the Red Cross, Rosetta International, and the United Nations. In addition, many cited religious organizations, food programs, health centers, legal counseling groups, and refugee associations. We also found a group that volunteers for TED Talks as well as fans who volunteer to work for products they like.

On average, respondents are willing to donate three hours per week to translate or interpret for a good cause. However, a bit more than one-quarter (27%) are not interested in donating any time (Figure 42).

> **Note:** *Some of the strong responses tied to donating large amounts of time is likely linked to the fact that Translators without Borders promoted the survey within its existing pool of volunteers – some of whom translate or interpret mostly through volunteering and not through paid activities.*

Figure 42: Time Linguists Are Willing to Donate

On average, how many hours per week would you be willing to donate your time to translate or interpret?

- 27% None
- 51% 1 to 3 hours
- 14% 4 to 6 hours
- 3% 7 to 9 hours
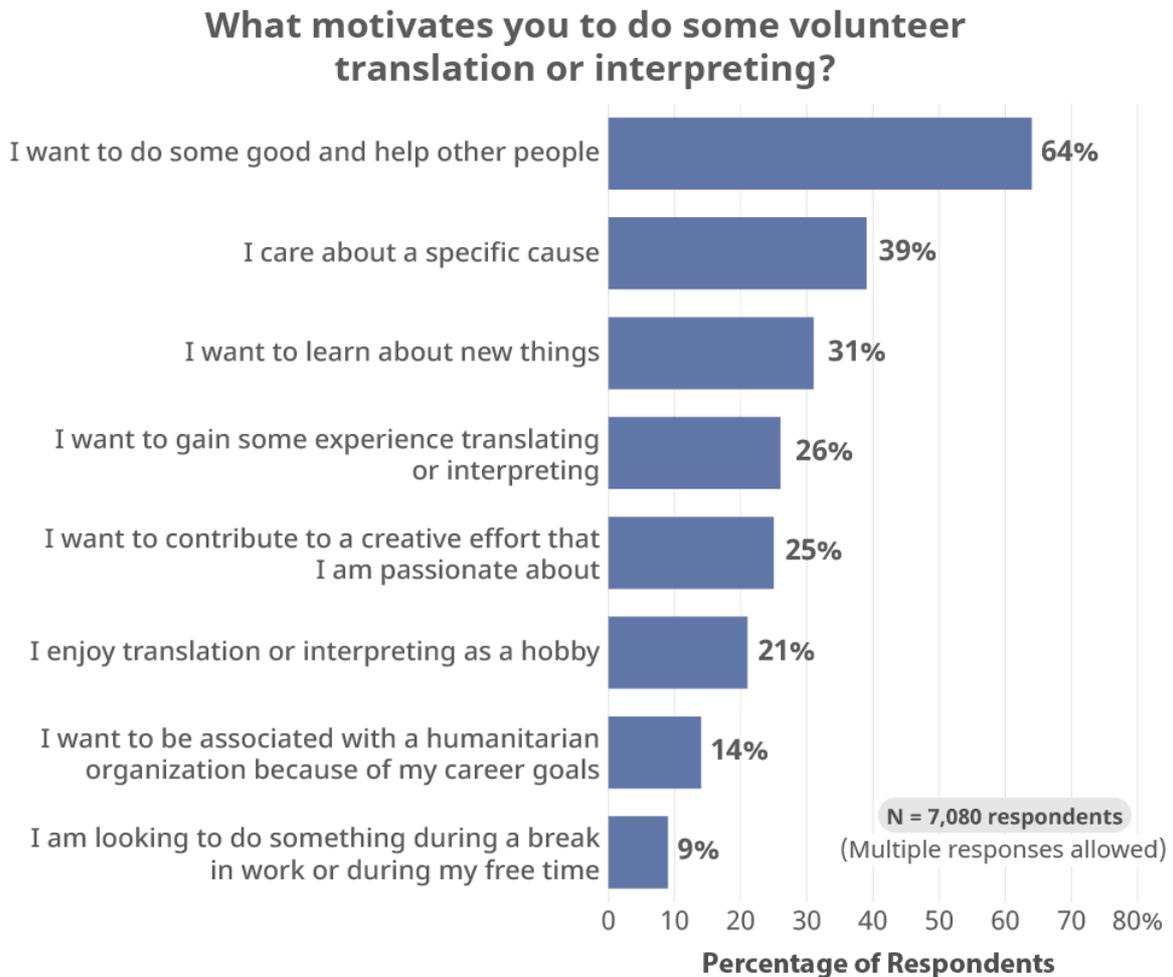- 5% 10 or more hours

N = 7,212
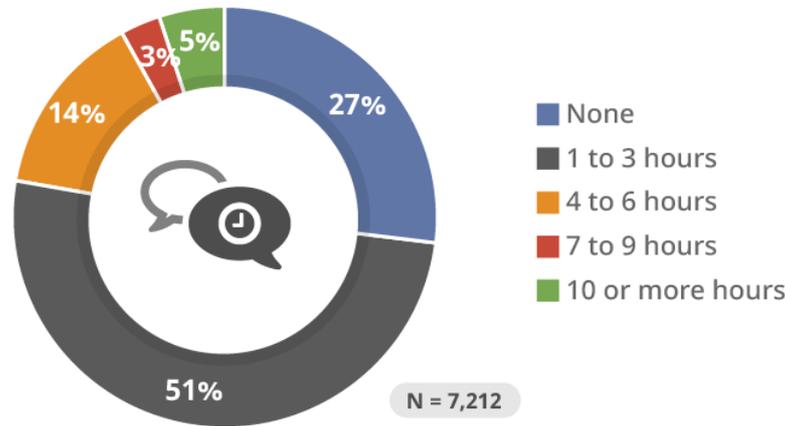
Source: CSA Research

Doing some good and helping people is the primary motive for linguists (64% of volunteers). Nearly two in five (39%) care for a specific cause. The next two reasons are more self-motivated with the desire to increase knowledge or experience (Figure 43). Multiple respondents relayed a disappointment in the lack of appreciation for their volunteer work. However, others have a different perspective:

> *"I find the mindset in the voluntary/NGO community refreshingly different: these are people who by and large have foregone the ordinary commercial goals for the sake of others, and this reflects in their communication with translators."*

One linguist shared an interesting approach:

> *"For smaller and one-off jobs, I suggest a donation to [humanitarian organization] in lieu of invoicing. Most clients are happy to do this."*

Figure 43: Linguists' Motivations for Volunteering

What motivates you to do some volunteer translation or interpreting?

I want to do some good and help other people	**64%**
I care about a specific cause	**39%**
I want to learn about new things	**31%**
I want to gain some experience translating or interpreting	**26%**
I want to contribute to a creative effort that I am passionate about	**25%**
I enjoy translation or interpreting as a hobby	**21%**
I want to be associated with a humanitarian organization because of my career goals	**14%**
I am looking to do something during a break in work or during my free time	**9%**

N = 7,080 respondents
(Multiple responses allowed)

Percentage of Respondents

Source: CSA Research

The counterpoints to this are the factors that limit our respondents' abilities to volunteer their services (Figure 44). The most common hurdles included lack of time (62%) and the inability to perform unpaid labor (39%). They also expressed the need to do something other than translate or interpret with their free time.

In addition, their comments brought up patterns of being disgruntled by human rights organizations that have the means to pay for the services but request the donation of services anyway.
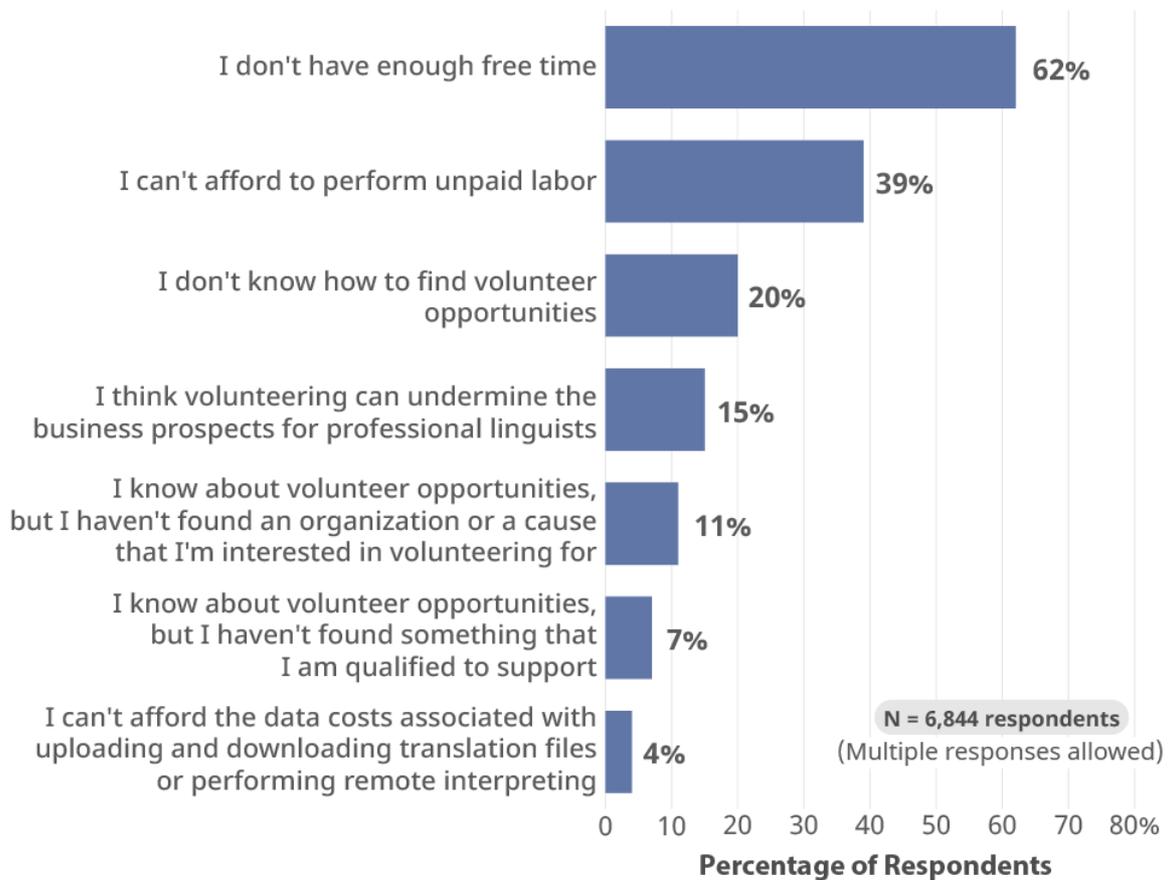
"I do not volunteer for any organizations – we are in a civilized country where organizations can receive funding for translators and interpreters. Therefore, I only do pro bono work for individuals who otherwise would have zero access or very poor access to translation and interpretation services."

However, other motives may come into play such as:

"My employer requires going through an arduous conflict of interest assessment before I can be permitted to provide outside translation services. It's not worth it."

Figure 44: Factors That Affect the Ability to Volunteer

What factors limit your desire or ability to volunteer translation or interpreting services?

Factor	Percentage
I don't have enough free time	62%
I can't afford to perform unpaid labor	39%
I don't know how to find volunteer opportunities	20%
I think volunteering can undermine the business prospects for professional linguists	15%
I know about volunteer opportunities, but I haven't found an organization or a cause that I'm interested in volunteering for	11%
I know about volunteer opportunities, but I haven't found something that I am qualified to support	7%
I can't afford the data costs associated with uploading and downloading translation files or performing remote interpreting	4%

N = 6,844 respondents
(Multiple responses allowed)

Percentage of Respondents

Source: CSA Research

The Future of the Linguist Supply Chain

Part of assessing the language supply chain also consists of characterizing its future. In this chapter, we review translator productivity, market changes, linguists' perspectives on the profession, and their career outlook.

Translator Productivity

Productivity is increasing thanks to experience and technology. Table 3 presents data on the number of words per hour that linguists reported when they started in the profession, now, and their personal forecast for five years from now. We excluded data from respondents that clearly responded in words per day. Naturally, those new to the profession are more likely to start with easier texts, which also affects performance. However, we also observe some overly optimistic productivity forecasts possibly based on unrealistic assumptions about technology.

Table 3: Translator Productivity in Words per Hour

Translator Productivity in Words per Hour				
Time Period	**Average**	**Minimum**	**Maximum**	**Median**
When you started in the profession	312	50	1,800	250
Now	574	100	3,000	500
Five years from now	708	100	3,000	500

Source: CSA Research, N = 5,286

> *"Translation is an ART, a trade, and a profession. It should not be rushed. I refuse to translate more than 1,500 words a day. QUALITY and ACCURACY are more important than QUANTITY and SPEED. We are not machines, we are people. I might use machines, but I still stick to my 1,500 word a day limit."*

Changes in the Market

Times are tough for linguists. They encounter greater pressure to offer services at lower prices (64%) or with faster turnaround times (56%). At the same time, about one in five (21%) have experienced a drop in market demand – most likely an effect of cheaper

competition and the impact of artificial intelligence (Figure 45). Marketing expertise may also play into this: Drops in revenue tend to be more common with freelance linguists who consistently struggle to market themselves and maintain a sales pipeline and therefore experience feast or famine cycles.

Figure 45: Linguist Perspectives on the Market

Linguist Perspectives on the Market Over the Last Year

	Stronger	No change	Weaker
Pressure to offer services at lower prices	64%	33%	3%
Pressure to deliver services faster	56%	43%	1%
Competition	49%	48%	3%
Market demand	37%	42%	21%

Percentage of Respondents

■ Stronger   ■ No change   ■ Weaker   N = 7,075
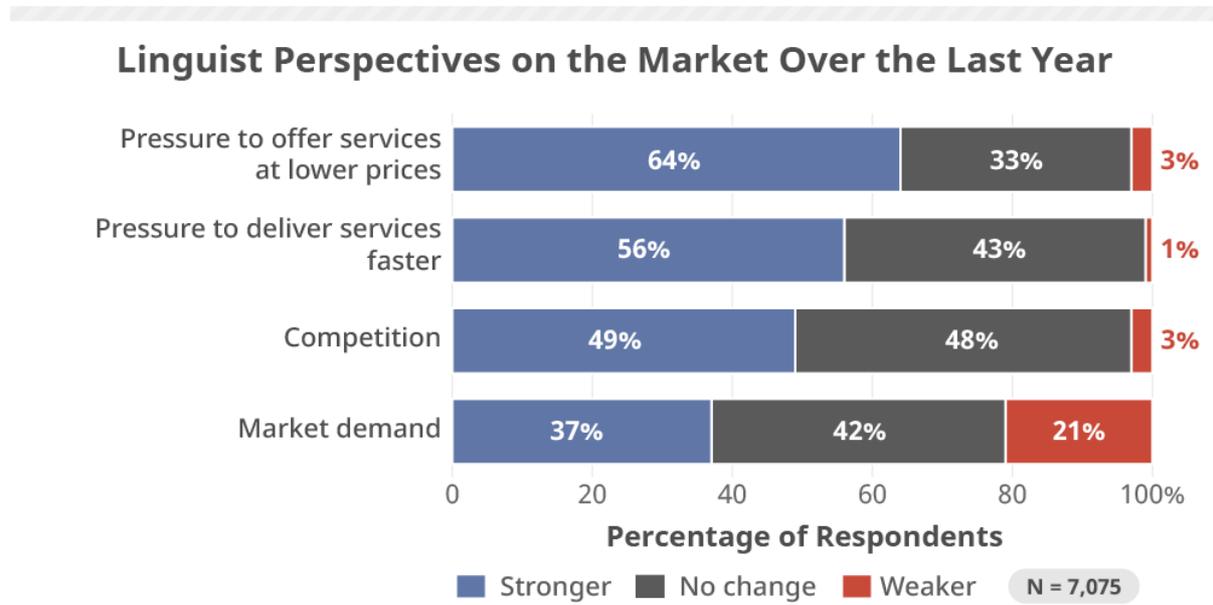
Source: CSA Research

Regarding the demand, we specifically asked about the work volume from direct clients to test the hypothesis that direct clients may be going straight to linguists and bypassing LSPs. Interestingly, the results are not definitive – the number of respondents that saw an increase over the last couple of years is nearly the same as those that experienced a decrease. This balance implies that the demand may be shifting to different providers, but not drastically changing overall (Figure 46).

Figure 46: Evolution of Work Volume from Direct Clients
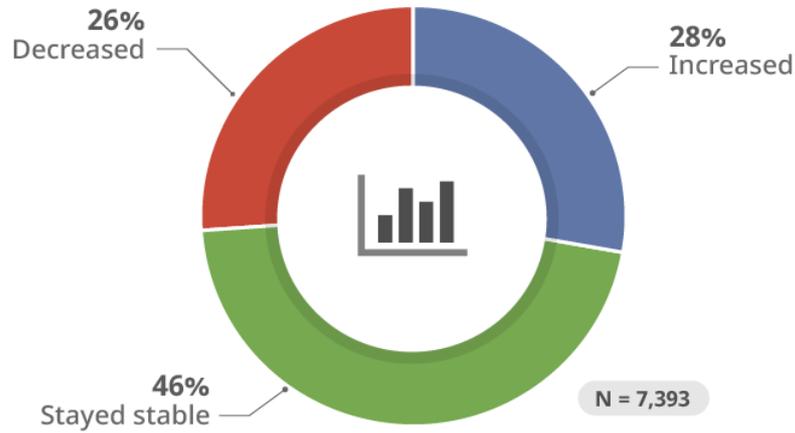
Source: CSA Research

Perspectives on the Profession

Part of assessing the future also ties to what motivates people to do the work. What freelancers appreciate most about their profession is the flexibility of hours (91%) and the diversity of the work they receive (75%) – which again ties to their overall work preferences. Pay came at the bottom of the list (33%), which is in line with the earnings results where only a small portion of linguists make a comfortable living just doing translation or interpreting (Figure 47).

In their comments, respondents highlighted the job flexibility – both in terms of geography and hours – and the degree of autonomy they have when they are their own boss. Being able to work with languages enables many to fulfill their passion as well as engage in continuous learning – both on the language and world knowledge fronts. Several also commented that they have social phobia and this line of work enables them to work with limited human contact.

Figure 47: Top Motivators in the Linguist Profession

What do you like about this profession?

Category	Value
Flexibility of hours	91%
Diverse work	75%
No boss	65%
No commute	62%
Sense of purpose	43%
Pay	33%

N = 6,003 respondents
(Multiple responses allowed)

Percentage of Freelance Respondents
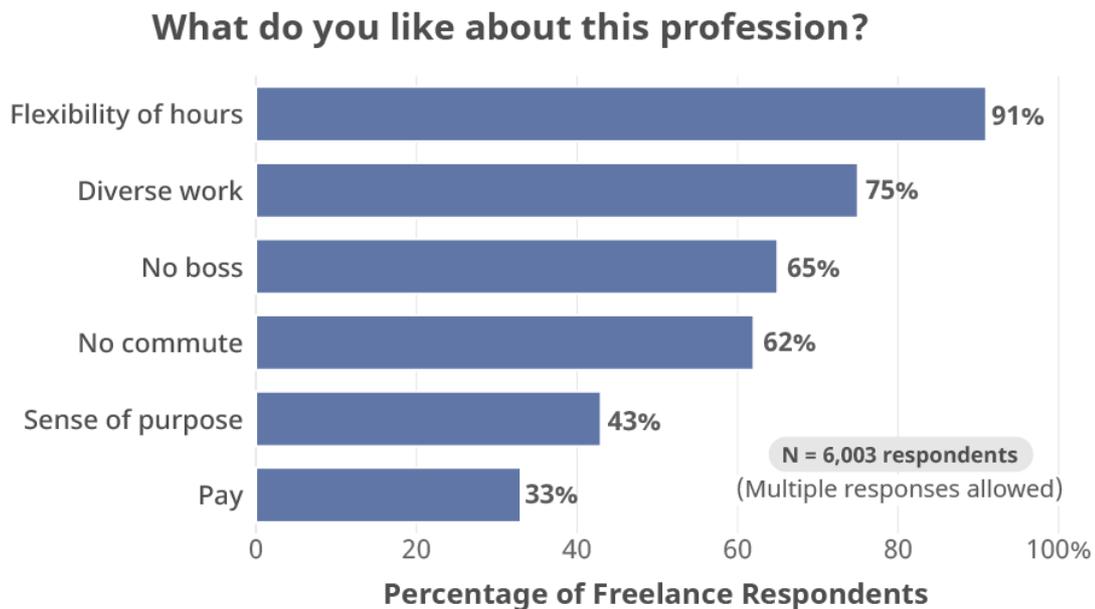
Source: CSA Research

The most difficult problem for freelancers is the unpredictability of income and work – it can be feast or famine (Figure 48). That disparity is compounded by the lag time between when the work is performed and when the linguist is actually paid. This gap can create uncertainty in work and pay over the course of the year and could explain why many linguists work a second job. Their next biggest concern was the lack of employment benefits – getting health insurance could be one of the reasons a linguist works a parallel profession.

One of the sad elements of this research is to see that one-quarter (25%) of respondents perceive a lack of respect for what they do. This can be the result of multiple elements such as pushy negotiation techniques, mass mailers that make linguists feel like robots, and the lack of recognition of the work and skills involved in delivering a project.

Figure 48: Top Demotivators within the Linguist Profession

What do you dislike about this profession?

Demotivator	Percentage
Fluctuating income	65%
Irregularity of work	57%
Lack of insurance or benefits	47%
Deadlines	39%
Stress	38%
Pay	30%
Irregular schedule	28%
Loneliness	26%
Lack of respect	25%

N = 5,997 respondents
(Multiple responses allowed)

Percentage of Freelance Respondents
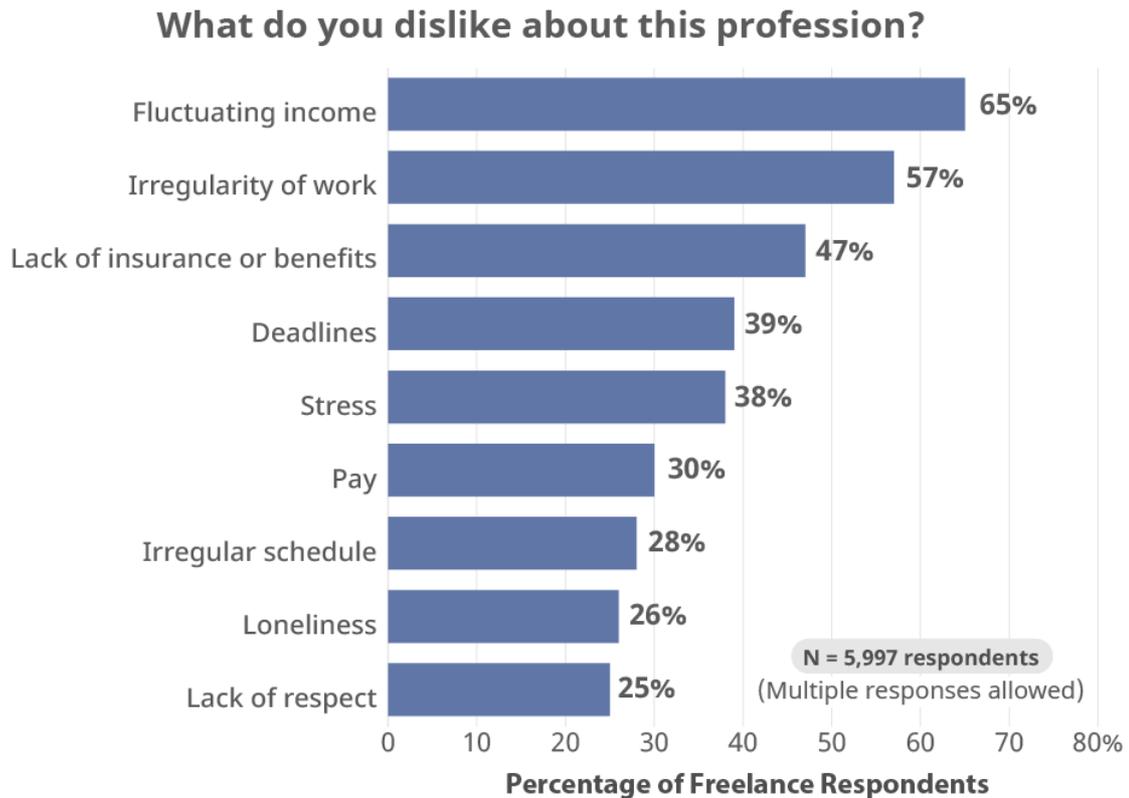
Source: CSA Research

Comments disclosed more and revealed the feeling of being a mechanized line worker completing dull and repetitive projects with few opportunities for creative or challenging work. They also struggle with isolation especially when quality or IT problems emerge. The lack of human contact and always working in front of a computer can bring cabin fever. This is compounded by the fact many fear being away from their desks by taking time for themselves, holidays, or vacations as they don't want to lose clients. The 24/7/365 availability expectation burns them out.

Respondents also cited common client-caused issues: source materials of poor quality; files sent late but deadlines that stay the same; late or no payment; and lack of feedback, recognition, and credit for their work. When they contract with LSPs, linguists complain that rude and incompetent project managers grate on them. Income issues were also common in the answers including challenges of fluctuating income, rate freezes, low balling, and free job requests from clients and agencies.

Finally, we asked survey takers about their biggest challenges. The top concern is finding clients (55% of respondents), followed by dealing with price (50%) and timeline pressures (35%) (Figure 49).

Figure 49: Linguists' Biggest Challenges

What are your biggest challenges?

Challenge	Percentage
Finding clients	55%
Dealing with price pressure	50%
Dealing with speed pressure	35%
Dealing with the round-the-clock nature of the business	29%
Keeping up with the volume of work	25%
Keeping up with the technology	21%
Retaining clients	19%
Scammers that steal a linguist's identity	18%
Maintaining quality	17%
Dealing with quality pressure	12%

N = 5,998 respondents
(Multiple responses allowed)

Percentage of Freelance Respondents

Source: CSA Research

In their comments, respondents listed a variety of other challenges that were either repeats from other questions in the survey or more random thoughts such as needing to fight the tendency to be a workaholic, figuring out how to retain the right concentration levels to interpret when ageing, juggling the cost of professional development, or finding ways to deal with low quality language resources.

Career Outlook

Our interest in the future viability of the profession led us to ask whether linguists intend to remain in the profession five years from now. The great majority (91%) are likely or very likely to remain translators or interpreters. That leaves about 9% that are thinking of leaving the business (Figure 50). They cited health and family reasons as well as issues with competitiveness and fear of the impact of technology.

> *"For my language pair, it is highly competitive and difficult to get a fair payment."*

> *"I'm afraid machine translation will keep developing and some day translators won't have same opportunities."*

> *"It's because of the unstable nature of work versus unstable income and the physical and psychological burdens of work pressure."*

Figure 50: Likelihood to Continue Working as a Linguist

How likely are you to be working as a linguist five years from now?

- Very likely — 60%
- Likely — 31%
- Unlikely — 7%
- Very unlikely — 2%

N = 7,414
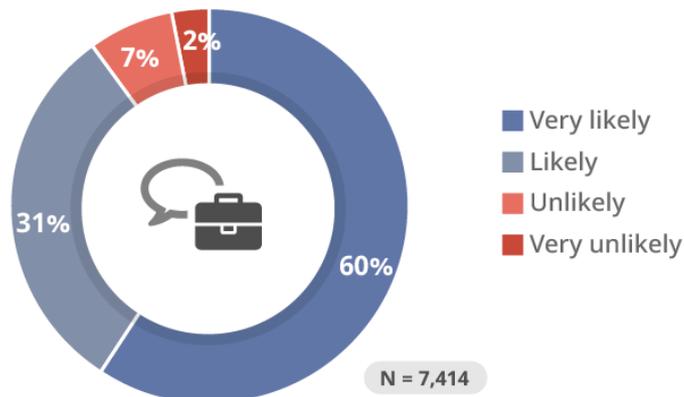
Source: CSA Research

As a follow-up question, we inquired whether linguists are likely to recommend translation or interpreting as a career to a friend or family member. The numbers aren't as strong for this: 66% would recommend it and about a third (34%) wouldn't. This

figure may spell trouble for future language supply chains (Figure 51). Current linguists may try to stick out their career because they are already invested in it. However, frustrations regarding pay and work conditions as well as the fear of the impact of artificial intelligence tempers their visions of passing the baton to the next generation of linguists.

Figure 51: Likelihood to Recommend a Linguist Profession

How likely are you to recommend a translator or interpreter career to a friend or family member?

- Very likely — 25%
- Likely — 41%
- Unlikely — 24%
- Very unlikely — 10%

N = 7,414
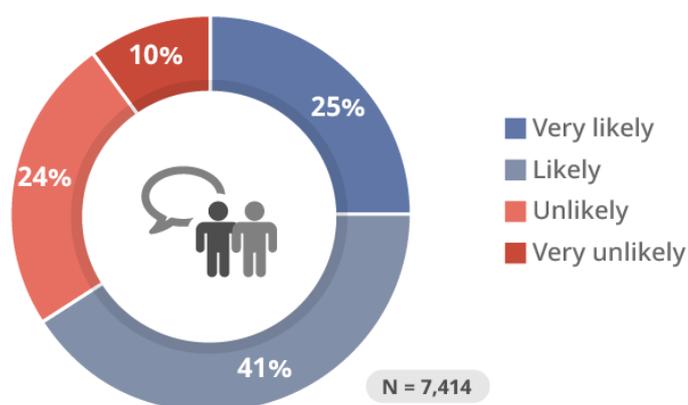
Source: CSA Research

The departure of qualified linguists from the talent pool combined with historic drops in enrollment in language studies is likely to create a shortage of resources. An additional factor is widespread media coverage of machine translation developers' claims to have reached "human parity." These reports can lead many students to believe that studying language is a dead-end field with no future. These factors will lead to a future drought of qualified individuals – the smart linguists who understand technology and can help with machine learning, improving machine translation, and working to further the goals of seamless integration.

Tightening supply on top of growing demand for human language services makes it inevitable that most will face challenges in finding and retaining qualified staff in the future. The constant increase in volumes is setting the stage for more disruptive changes for people on the front lines of providing language services. This means that all

industry participants need to pause and give some thought to who will translate their materials in the future or be there to interpret for their meeting.