The Web Globalization Report Card
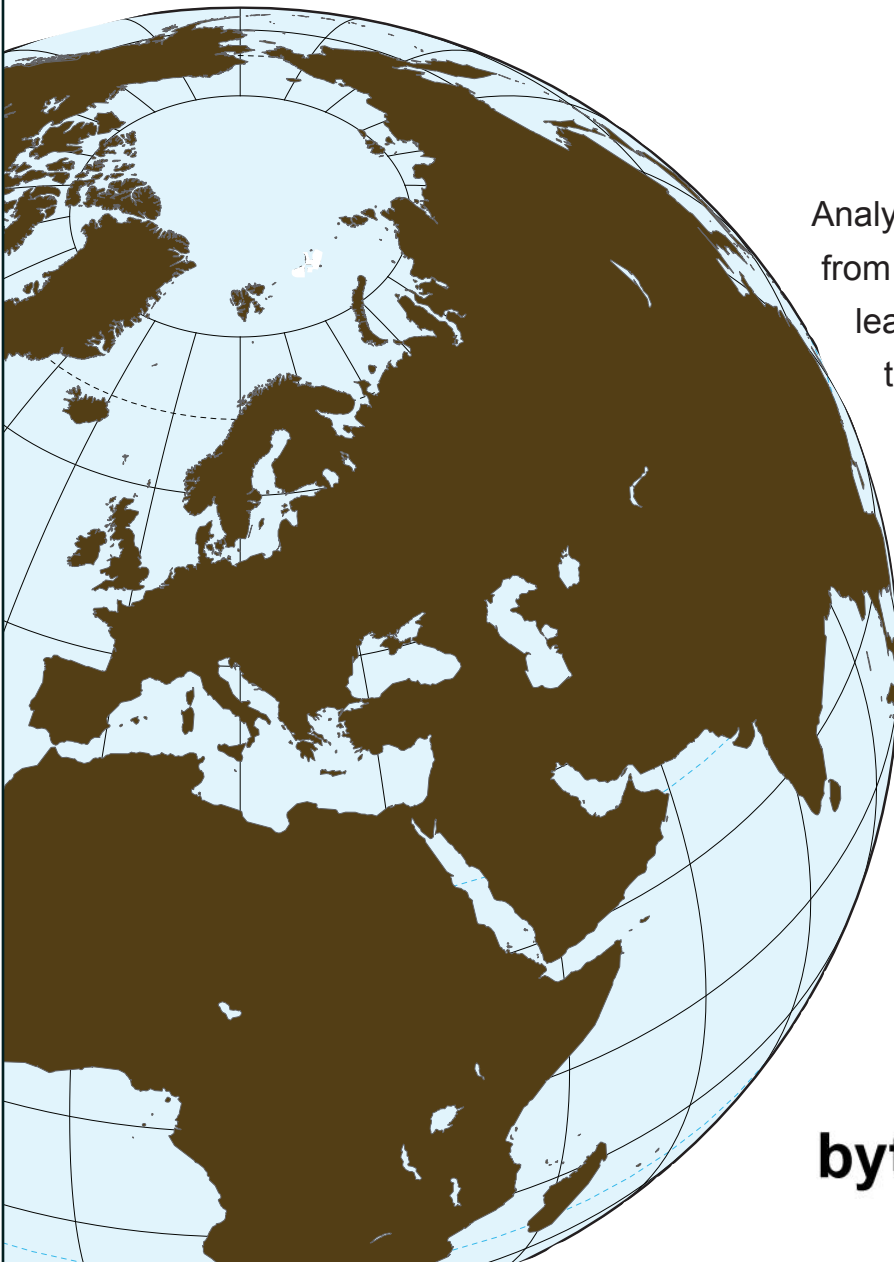
Analysis of 225 global Web sites – from Adobe to GE to Yahoo! – the leaders, the laggards, the latest trends, and the best practices

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Part IV: Industry Profiles and Company Insights

Introduction

This is our fifth edition of *The Web Globalization Report Card*. And I can't help looking back to 2002, when we first set out to benchmark Web sites.

In 2002, I was happy to find any Web site that supported more than 20 languages; there weren't many out there. This year, 20 is the *average* number of languages supported.

In 2002, Simplified Chinese could be found in roughly 50% of the global Web sites reviewed. This year, Chinese can be found on nearly 80% of all Web sites.

In 2002, Google supported a little more than 50 languages. Today, Google supports more than 115 languages, and Gmail alone supports more than 40 languages.

In 2002, John Deere offered only six languages in addition to English. Today, the company supports 20 languages, including Czech, Danish, and Turkish.

Every year, I come away impressed with the speed at which companies have embraced Web globalization. And while many companies still have a good deal of embracing left to do, the practice of Web globalization is clearly entering a mature phase in its development.

Best practices, such as the use of global templates and splash global gateways, have become widely accepted. As companies get more comfortable managing their sites from a global level, I'm seeing increased innovation at the local level. For example, over the past year, I've seen companies launch local-language blogs, podcasts, and RSS

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feeds. We're entering a phase in which local Web sites include a healthy mix of both localized and local content.

This report serves two purposes. First, it calls attention to those Web sites that have excelled in the practice of Web globalization. The people who manage these sites deserve credit for helping their companies do a better job of communicating with the world, regardless of language, culture, or geography.

Second, this report identifies emerging trends and established best practices to help other companies improve their sites while avoiding the painful learning curve of trial and error.

This year, we increased the number of sites reviewed by 25 to include sites such as Voice of America, eFax, and Cemex. We also added a new category – social networking – to include sites such as Facebook, MySpace, and XING.

And please do not hesitate to contact me with your comments and questions about this report. As always, let me know if there are any global Web sites you think should be included in our next report.

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Executive Summary

In developing this report, we analyzed 225 global Web sites across 21 industry categories – focusing on many of the world's largest companies. We rated each site according to the following four criteria, evenly weighted:

- Global Consistency
- Global Navigation
- Localization
- Global Reach (Languages)

Based on these criteria, here are the Web sites that scored highest overall:

Top 20 Global Web Sites 2008

1. Google	11. Deloitte
2. Wikipedia	12. American Express
3. Cisco Systems	13. Adobe
4. Volvo	14. Lenovo
5. Philips	15. Xbox
6. Caterpillar	16. Panasonic
7. Netvibes	17. IBM
8. Microsoft	18. 3M
9. HP	19. NIVEA
10. Nokia	20. XING

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While these 20 Web sites represent a diverse range of industries, they share a number of Web globalization best practices. For starters, they support an average of 48 languages, more than twice the average for all 225 sites reviewed.

They also share in the use of consistent global design templates. And they have invested heavily in localizing each Web site for the country and culture, from providing a wealth of translated content and local-language customer support to providing culturally customized visuals and terminology. Finally, these sites generally excel in global navigation – helping non-English speakers navigate to their native-language content.

Google on Top, Again?

Google is no stranger to the top of our rankings. And it is natural to wonder what makes Google so special. Google actually lost a few points this year because its global navigation was inconsistent between its expanding number of Web applications. But even with the loss in points, Google retained its lead.

Google does well in our rankings not just because its search engine interface is translated into 117 languages. If we look past the search engine altogether, we find other Google applications that also support an impressive range of languages. Gmail, for example, supports 41 languages. By itself, Gmail supports more languages than 215 other Web sites in this report. Google Adwords also supports 41 languages.

Leaders of Industry

To better understand how companies compete against their peers, we divided the 225 Web sites into 21 industry categories – from automotive to financial services to the new "social networking" category. You will find in-depth analysis of each category in Part IV of this report.

Here are the leaders of each category:

Industry	Leader
Airlines	Emirates
Automotive	Volvo
Business Technology	Cisco Systems
Consumer Goods	3M
Consumer Technology	Philips
Delivery Services	DHL
Fashion/Apparel	NIVEA
Financial Services	American Express
Hotels/Resorts	Starwood Hotels
Industrial/Diversified	Caterpillar
Media/Entertainment	BBC
Medical/Pharma	Merck
Non-profit/Govt.	European Union
Professional Services	Deloitte Touche Tohmatsu
Rental Car	Hertz
Retail/Restaurant	IKEA
Semiconductors	Texas Instruments
Social Networking	XING
Sporting Goods	Adidas
Video Games	Xbox
Web Services	Google

There was little change in leadership from 2007 to 2008. The only company that lost its lead was UPS, replaced by DHL.

However, most of the categories saw a heightened level of competition. For example, in semiconductors Texas Instruments narrowly edged out Intel and Renesas, which both tied for second place.

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Top Findings, Trends, and Recommendations

This section distills this report into the most important takeaways and recommendations:

The global design template is officially ubiquitous

This year, 62 companies scored a perfect score for global consistency – up from 28 in 2007. What does this mean? It means that the global design template is now a widely accepted best practice in Web globalization. As companies continue to add languages and local Web sites in the years ahead, the need for global consistency will only intensify.

> **Recommendation**: Unless you have a specific business reason for not migrating to global design templates, now is the time to act. Global consistency allows for fewer people to manage more country sites and also allows for all content managers to use common tools and processes.

The average number of languages has increased, again

In 2006, the average number of languages supported was 15. This year, the average is 20 languages. It used to be that any Web site that supported ten languages stood apart from the pack; today, that baseline is now 20 languages or more.

> **Recommendation**: While we do not recommend adding languages simply to keep up with the competition, we do recommend that companies conduct regular "language audits" to ensure they are not missing opportunities in new markets or alienating current customers in existing markets.

French remains the most popular language (next to English)

French edged out German in 2007 for the top spot and remains that way today with 202 of the 225 Web sites supporting it. English is still the dominant language of all global Web sites, with every Web site supporting it.

Chinese and Brazilian Portuguese rise in the rankings

Chinese (Simplified) edged up into 5th place this year, up from 6th place in 2007. Brazilian Portuguese moved up from 18th place to 10th place this year. Both trends are the result of the rise of the BRIC (Brazil, Russia, India, China) economies. Roughly eight out of ten Web sites included in this report now support Chinese.

Eastern European languages remain hot

Languages such as Polish, Ukrainian, Turkish, and Slovakian continue to grow in popularity as companies focus on Eastern and Southern European markets.

Arabic levels off

Last year, Arabic was found on 17% of all sites studied and it remains that way today. While we continue to see companies adding Middle Eastern Web sites to their portfolios, Arabic language support remains lacking.

Indian languages begin to emerge

Most companies that develop Web sites for India use only English. In a country with more than 20 official languages, picking one language risks drawing attention to all the other languages that were not selected. As a result, English is viewed as a neutral language for this market. And yet it's not the native language of most Indians. Google has improved its support of Indian languages and Yahoo! and AOL also now support multiple languages in India. The most popular Indian language so far is Hindi, seen on ten Web sites. Tamil came in second, with eight Web sites, followed by Telugu,

Malayalam, and Urdu. While these languages are not supported by the vast majority of global companies, we see encouraging signs for the year ahead.

<mark>Recommendation</mark>: If you're serious about long-term success in India, it's time to develop a language strategy, even if the result is not to translate at this point. Hindi will likely be the first language selected for translation.

Spanish sites for the US market continue to multiply

We counted 37 Web sites directed toward Spanish speakers in the US. Companies that added these sites last year include Build-a-Bear, United Airlines, and Lexus.

Splash global gateway growth levels off

Last year, we noticed a spike in the number of sites using splash global gateways – up from 15% in 2006 to 27% in 2007. However, this year the number of sites using splash global gateways remained static – at 54 sites overall. While we still expect the percentage to increase in the years ahead, the use of geolocation and language negotiation will play a role in allowing companies to move away from relying solely on splash pages.

<mark>Recommendation</mark>: If your site does not make use of geolocation or language negotiation, we recommend that you at least test the effectiveness of using a splash gateway, particularly if your site supports more than 15 languages. Nearly every company that we have tracked that uses a splash global gateway has noticed large increases in traffic to the localized Web sites.

Geolocation and language negotiation are becoming mainstream global navigation technologies

For several years, Google was the only company known for its use of both geolocation and language negotiation to seamlessly direct users to local content. This year, four additional companies are using both technologies: Netvibes, XING, eFax, and CSFB. Many more companies are using at least one of these technologies.

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Recommendation: Although geolocation and language negotiation are not by themselves a "silver bullet" solution to global navigation, we recommend taking a close look at how they can improve the navigation experience for your Web users around the world. However, these technologies do not eliminate the need for a visual global gateway solution.

Global success does not equate Web globalization success

Large multinational companies do not inherently have an advantage when it comes to creating successful global Web sites. Many of the lowest-scoring Web sites also happen to be household names around the world, such as Four Seasons, Disney, and Wal-Mart.

The .us domain is gaining acceptance

Last year, we noted that Volvo Cars hosted its American Web site at **www.volvocars.us** and its global splash gateway at **www.volvocars.com**. We're now seeing other companies also hosting their US sites at the .us domain, such as Emirates Airlines and DHL. The .us domain provides a practical alternative to companies that often embed the country name with their domain, such as Haier does with **www.haieramerica.com**. The address **www.haier.us** is a more globally consistent solution.

Recommendation: We are proponents of companies using the .us domain. However, executives need to be aware that there is no **Google.us** search engine for the United States, which means the .com site may be ranked ahead of the .us site by the Google.com search engine.

Blogs and RSS feeds are going multilingual

From Cisco Systems to Dell to Deloitte, companies are beginning to launch product and news feeds across multiple markets and languages. In addition, companies are adding local-language blogs, authored by product managers, customer advocates, or executives. These tools are an excellent way for companies to support the creation of local content without incurring translation costs. Furthermore, locally produced content is typically more relevant than content that is produced in headquarters, translated, and then distributed to a global audience.

> Recommendation: Begin working with your most active and enthusiastic local office to test a blog and/or product feed. Also look into adding user forums – another great source of local content that requires little investment and also provides a great way to learn from the local customers. And consider the impact this new content will have on search engine performance in the local markets.

"Business Card" Web sites become more prevalent

Because companies only have so much money to allocate to Web globalization, they tend to devote most resources to larger markets. And yet there is a great need for companies to expand into many more markets sooner rather than later. That's why we're seeing companies embrace the "business card" approach to Web localization. A business card site may be as simple as one translated Web page with the contact information of the local sales office or it may also include press releases, product descriptions, and a lead-generating Web form. Companies that have taken this approach – to varying degrees – include Goldman Sachs, Steelcase, and SolidWorks. Such sites have proven themselves to be a practical way for companies to cost-effectively test the waters of new markets without heavy upfront expenditures.

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<mark>Recommendation</mark>**:** To ensure that companies successfully align their Web globalization objectives with their budgets, we recommend developing a tiered Web globalization strategy. This approach begins with the understanding that not all country Web sites will get the same financial support, but that even the lowest tier of Web globalization – the business card site – if managed well, can create a positive user experience. The tiered approach allows retailers, for example, to test demand before opening stores within a given market. Apple has a physical retail presence in just three countries outside of the US, yet offers localized online stores for more than ten countries. Apple is able to take the sales information from these many localized stores and use this information to plan in which countries to pursue physical stores.

Translation "crowdsourcing" gaining fans

Netvibes took a page from Google's playbook by recruiting volunteers to translate its interface. The strategy has worked well; the company added 50 languages at a blistering pace with very little in the way of investment. Facebook also relied heavily on this approach, using 1,500 volunteers to translate its Spanish site, with more languages in the works.

<mark>Recommendation</mark>: Crowdsourcing tends to work best with Web-based applications that passionate users want to use in their own language. And it's usually a strategy that companies follow out of necessity rather than luxury – that is, crowdsourcing is best-suited to start-up companies. If you have developed a Web-based application that users around the world use and love, you might be able to recruit volunteers. Keep in mind that there is no such thing as "free" translation. Crowdsourcing requires processes and reviewers to ensure that the resulting translations are of high quality. And if timing is critical, it is hard to guarantee deadlines when you rely solely on volunteers.

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Put language before brand

In 2006, Web sites such as BlackBerry and Nokia used splash landing pages that required the users to select a brand or division before selecting their language. The problem with this approach is that users often could not understand which brand or division to choose because the options were not presented in their native languages. This year, we're pleased to say that both BlackBerry and Nokia have launched new landing pages that present a language gateway users can use before selecting a product or brand.

Recommendation: At all costs, avoid placing a product or brand landing page in front of your splash global gateway. Users need to select their language before they can be expected to read any promotional element.

PART I
THE 225 WEB SITES AND HOW THEY WERE SCORED

The 225 Web Sites

Here are the 225 companies included in this report, sorted alphabetically:

3Com
3M
Accor Hotels
Adidas
Adobe
Air France
Alcoa
Amazon
AMD
American Airlines
American Express
Amway
Analog Devices
AOL
Apple
Ask
Audi
Autodesk
Avaya
Avon
Bayer
BBC
Bearing Point
Best Western
Black & Decker
BlackBerry (RIM)
BMC Software
BMW
Bose
Boston Scientific
Briggs & Stratton
British Airways
Broadcom
Budweiser
Build-a-Bear
Business Objects
Cadillac
Canon
Capgemini
Cargill
Carnival Cruise Lines
Cartier
Caterpillar

Cemex
Chanel
Chubb
Cisco Systems
Citibank
CNN
Coca-Cola
Colgate
Columbia
Continental
Creative
Crocs
CSFB
Dell
Deloitte Touche
Tohmatsu
DHL
Disney
Dollar Rent A Car
Dow Corning
E*TRADE
Ebay
eFax
Eli Lilly
EMC
Emirates
Ernst & Young
ESPN
Estée Lauder
European Union
evian
Expedia
Facebook
Fairchild
Semiconductor
FedEx
Fidelity
Flickr
Four Seasons
Freescale
GE
Genzyme
Godiva

Goldman Sachs
Google
Haier
Harry Potter
Heineken
Hertz
Hilton
Honda
Honeywell
Hotels.com
HP
HSBC
Huawei
Hyatt
Hyundai
Iams
IBM
IKEA
ING
Intel
InterContinental Hotels
J. Crew
Jaguar
John Deere
Jones Day
KitchenAid
KLM
Kodak
KPMG
Lancôme
Last.fm
Lenovo
Levi's
LexisNexis
Lexus
LG
Loréal
Louis Vuitton
Marriott
Maytag
McAfee
McDonald's
McKinsey & Co

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Medtronic	Patagonia	Starwood Hotels
Mercedes	PayPal	Steelcase
Merck	Pfizer	Subway
Microsoft	Philips	Sun
Mini	Playstation	Symantec
Monsanto	Polo	Texas Instruments
Monster	PricewaterhouseCoope	Thrifty
Morgan Stanley	rs	Tiffany
Motorola	Procter & Gamble	TNT
MSN	Prudential	Tommy Hilfiger
MySpace	Purina	Toshiba
National	Radisson	Toyota
NEC	Reebok	Unilever
Nestlé	Renesas	United Airlines
Netvibes	Ryanair	United Nations
New Balance	Saab	UPS
Nike	Salesforce.com	Voice of America
Nikon	Samsung	Volkswagen
Nintendo Wii	Sanofi-Aventis	Volvo
Nissan	SAP	Wacom
NIVEA	SAS	Wal-Mart
Nokia	Seagate	Warner Brothers
Northwest Airlines	Sherwin-Williams	WebEx
Novartis	Siemens	Western Union
Novell	Siemens Medical	Whirlpool
NVIDIA	Skype	Wikipedia
NXP Semiconductors	Smart	World Bank
OCLC	Snapfish	Wyeth
Oracle	Software AG	Xbox
Orkut	Sol Melia	Xerox
Pageflakes	Sony	XING
Palm	ST Microelectronics	Yahoo!
Panasonic	Starbucks	Yamaha

Industry Breakdown

We include a diverse range of industries in this report to ensure that we present a picture of the state of Web globalization as a whole – and that we don't miss out best practices in one industry that may be of benefit to other industries.

The industry category with the largest representation is Consumer Technology, which includes companies ranging from Intuit to Apple to BlackBerry. Here are the industry categories and the number of companies included within each.

Our goal was to include the leading companies from each industry. However, if a company did not support at least two languages on its Web site, it was not included in this report.

We also added a new category this year – Social Networking – which includes Web-based companies such as Facebook and MySpace.

| Industry	Companies
Consumer Technology	25
Web Services	20
Business Technology	18
Consumer Goods	18
Automotive	15
Industrial/Diversified	12
Semiconductors	12
Financial Services	12
Medical/Pharma	12
Hotels/Resorts	11
Fashion/Apparel	11
Airlines	9
Retail/Restaurant	9
Professional Services	8
Media/Entertainment	7
Sporting Goods	6
Non-profit/Govt.	5
Social Networking	5
Delivery Services	4
Video Games	3
Rental Car	3

Scoring Methodology

We reviewed every Web site in this report manually, noting exactly what languages were supported by each site, reviewing localized Web sites across multiple countries, and diving deeply into specific country Web sites.

Although the process of analyzing Web sites is, by default, a largely subjective endeavor, our experience in studying thousands of Web sites has given us both the historical and the strategic basis for making educated assessments. We have found that best global Web sites share the following attributes:

- Content is in the user's native language
- Content is localized for the user's country and culture
- Localized content is easy to find
- Web design and branding is globally consistent

These attributes were distilled into the following four quantitative and qualitative metrics:

Criteria	High Score
Global Consistency	25
Global Navigation	25
Localization	25
Global Reach (Languages)	25
TOTAL	**100**
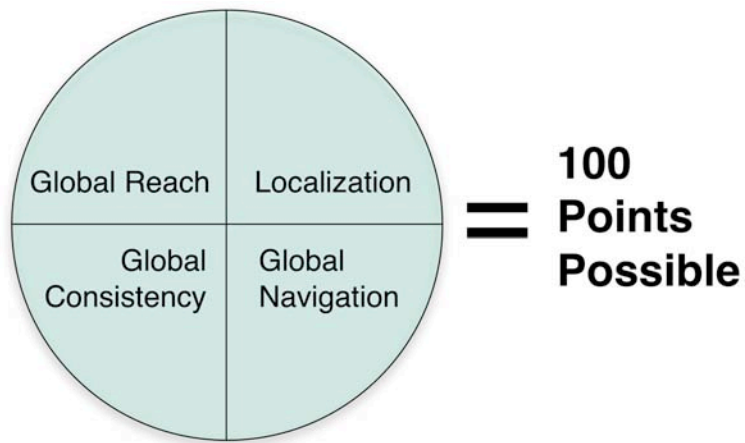
The four criteria are evenly weighted to ensure that those Web sites that score highly are truly best of breed. For example, a Web site that supports 100 languages may still not make it into the top 20 if it does not also provide users with a depth of localized content and effective global navigation.

The scoring criteria are explained in more detail on the following pages.

Global Consistency

Companies should use global design templates to ensure a consistent user experience and to minimize internal Web site management costs. A global template need not override local customization; a well-designed Web site can both be globally consistent and locally flexible.

When rating a Web site, we review a minimum of four country Web sites. When possible, we look at sites across three regions: Americas, EMEA, and Asia. Major markets that we may take a particularly close look at include Brazil, Japan, China, Germany, and Russia.

Global Consistency Scoring Methodology

Score: 15 to 25

To score above 15, a Web site must use a global template on the majority of its local Web sites. Additional points are given for templates that are flexible enough to allow for local customization and creativity.

Score: 0 to 14

A global template may be used, but often sporadically. Or, if used, the template may not be conducive to effective localization, such as the embedding of text within visuals or the lack of dedicated space for local content.

Global Navigation

A localized Web site is of little value if the Web user cannot find it. As companies increase the number of local Web sites they support, the challenge of directing users to these sites grows in importance.

A pull-down menu on the home page isn't good enough.
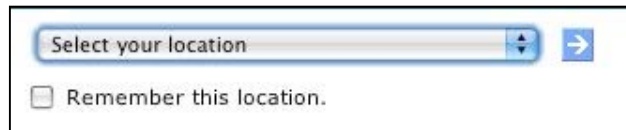
There are many details involved and many ways for users to get lost along the way. **We have published an e-book devoted to global navigation:** *The Art of the Global Gateway.* **This e-book is provided free to all purchasers of this report; to receive your copy, contact John Yunker at jyunker@bytelevel.com.**

The book provides an in-depth explanation of the major elements a company may employ to direct Web users to local content, which include:

- The country code domain (such as .de or .fr)
- The splash global gateway
- The permanent global gateway
- Language negotiation & geolocation

These elements are illustrated on the following page.

Elements of Global Navigation

A Web user wants to find your company's German Web site...

1 Web user inputs country domain. (i.e., acme.de)

2 Web user visits acme.com and uses global gateway.

3 Server-based technologies may also assist the user in finding the German site.

lang="de"
Language Negotiation

255.34.2.1
Geolocation

Web Server

Country/Language Web Sites

Language negotiation identifies the user's language preference and geolocation identifies the user's location. **Neither technology is perfect**, which is why the global gateway is essential.

© Byte Level Research

There is no one "silver bullet" approach to global navigation. Successful Web sites often rely on a mix of front-end and back-end solutions.

Please note that a Web site need not use all four elements listed above to score highly. The use of language negotiation and geolocation are considered optional. While we take the use of these elements into account in scoring, the lack of them does not necessarily

hurt a company's score. Our focus is on the overall user experience for non-English speakers who arrive at the global home page.

Specifically, we ask the following questions as we review each Web site:

- Does the Web site use **country code domains**? The use of country code domains is very important, not only for usability but also for performing well in local search engines.
- Are language and country names presented in the dominant local language, such as *Deutsch* instead of *German*?
- Are **flags** used on the Web site? Flags should never be used to indicate language. They may be used to indicate location, but this can be a delicate issue – with Chinese users and the Taiwan flag, for example.
- Does the site use a **splash global gateway**? A splash global gateway page is generally a good device for ensuring that users who arrive at a .com site self-select their proper locale. For companies that offer more than 20 localized Web sites, a splash global gateway is preferable to a pull-down menu. However, a splash page should rely on cookies to save the user's preference so that this page is skipped on repeat visits.
- Does the site include a **permanent global gateway**? A permanent global gateway is the link (or menu) on all Web pages that allow users to change their locales if needed. The user must have the ability to change languages/locales from any Web page across any division, brand, or geography. The gateway link should be located in a consistent, easily found location, preferably the upper right corner of the Web page – the "sweet spot."
- Does the site use visual **icons** to improve usability? We recommend using a globe or map icon to highlight the global gateway link. This visual device communicates to users across all languages.

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- Does the Web site use **geolocation** or **language negotiation**? There is a clear trend toward more companies using these technologies, which we document throughout in this report. These two technologies do not replace the need for a permanent global gateway, but they do improve the user experience.

Global Navigation Scoring Methodology

Score: 15 to 25

To score above 15, a Web site must include a permanent global gateway that is easily found on all Web pages. Details that impact score include translated links, map or globe icons to draw attention to the global gateway, and the capturing of the user's locale preference to bypass the splash global gateway upon repeat visits.

Additionally, for companies that offer more than 20 localized sites, we recommend the use of a splash global gateway for first-time visitors to the Web site. The implementation of a splash gateway will also affect the score. We also test to see if a Web site is using geolocation and/or language negotiation. The effective use of these technologies also factor into scoring.

Score: 0 to 14

Navigation is inconsistent at best or, in some cases, missing altogether. A permanent gateway may be included but the execution is poor.

Localization

Localization refers to how relevant a Web site is for the end user. We rate each Web site by how well it is localized for its target audience in relation to competitors and "best of breed" Web sites. **This category is the most subjective because we do not browse every country Web site in depth.**

For each company, we view a minimum of three country Web sites from the point of view of a local Web user. Questions we ask include:

- Is there a depth of content in the local language?
- If there is not a depth of local content, does the Web site manage the user's expectations well (local Web site vs. local façade)?
- Is local contact information easy to find?
- Are elements such as measurements, dates, and currencies localized for each country?
- Are the images and icons used on the Web site relevant and usable? And are there any potentially culturally offensive elements on the site?

Local Web Sites vs. Local Façades

While more local content is generally preferable to less local content, the score is more closely related to how successfully the site manages user expectations. That is, does the site create the impression that there is more local or translated content than there actually is?

In past reports, we have been highly critical of what we termed the "local façade" (a translated home page with little else translated). However, global Web executives have generally found that it is better to

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offer some local content than none at all, provided the Web site does not create unrealistically high user expectations. For example, offering a country Web site that includes local contact information and a brief explanation of what the company is and what it offers is preferable to offering no local content at all. This "tiered Web globalization" strategy can be very effective in testing new markets.

That said, a company such as Amazon, which offers a depth of local content and features across seven countries is going to score more highly in the localization category than a site that offers 40 country Web sites consisting of contact information and a few paragraphs of translated text.

Localization Scoring Methodology

Score: 15 to 25

To score above 15, a Web site must be useful and relevant to the local user. Elements may include easy-to-find contact information and customer support, localized search engine and ecommerce features, and local promotions. Additional features that benefit the score would be language- or country-specific newsletters, blogs, forums, and other personalized applications.

Score: 0 to 14

To score below 15, the reviewed local Web sites generally appear more like local facades than actual local Web sites.

Global Reach (Languages)

The Internet connects computers, but it is language that connects people.

A Web site must support more than 20 languages to reach 85% of the 1.2 billion Internet users around the world. And while 20 languages is an impressive achievement, many global companies now support 30 or even 40 languages. We note the languages supported by each Web site we reviewed. To achieve a high score of 25, a Web site must support 40 or more languages, excluding English.

Languages Scoring Methodology

Languages	Score
N/A	1
1	2
2	3
3	4
4	5
5	6
6	7
7	8
9	9
11	10
13	11
15	12
17	13
19	14
21	15
23	16
25	17
27	18
29	19
31	20
33	21
35	22
37	23
39	24
40+	25

Why we don't count English

English does not factor into our language counts simply because every site surveyed supports this language. English has become the default global language for corporate home pages. Most companies, even non-US companies, host their corporate home pages in English. For example, if you were to visit the home pages of these non-American corporations, you would be greeted in English:

- www.siemens.com (Germany)
- www.nestle.com (Switzerland)
- www.honda.com (Japan)
- www.samsung.com (Korea)
- www.cemex.com (Mexico)

No matter where companies are headquartered, they generally select .com as their global address and English as their global Web site language.

This trend implies that .com will gradually lose its closely linked association with the United States. Over the long term – and we emphasize long here – we believe that .us will become the home address for US Web sites. However, the use of geolocation and language negotiation technologies will allow a Web user who visits the .com site to see localized content – a practice pioneered by Google.

Language support ranges widely

To illustrate just how widely language support varies by company, we have assembled a list of well-known companies in the exhibit below:

An Overview of Language Support

A bar chart titled "An Overview of Language Support" showing Total Languages per company:

Company	Total Languages
Microsoft	40
Cisco	39
HP	35
Deloitte	30
Yahoo!	26
EMC	22
FedEx	20
Apple	18
Caterpillar	17
Nike	16
PayPal	11
Amazon	7

Total Languages

© Byte Level Research
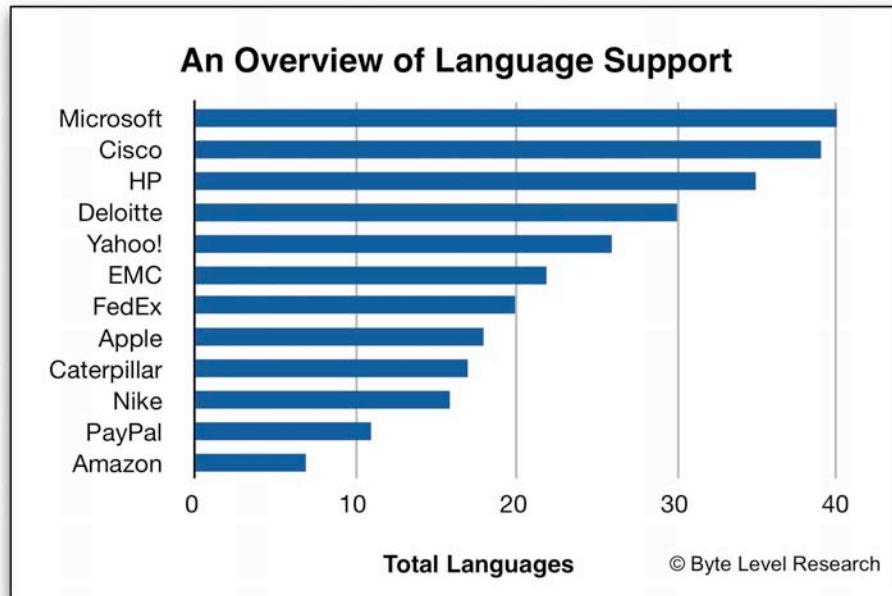
Can a Web site like Amazon score highly in this category?

If Amazon, with support for just seven languages, were to significantly improve its global navigation, it is possible for the site to rank in the top 40. Caterpillar supports just 18 languages and made it into the top 10 list. So it is technically possible for a company to be highly ranked if it doesn't lead in language support.

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Methodology FAQ

Here are the most common questions we have received over the years regarding our methodology. If you have any additional questions, please do not hesitate to contact us.

When and how were the Web sites evaluated?

The 225 sites in this report were reviewed between January and February 2007 by John Yunker and a research associate. In producing this report, we dedicated an average of one hour to each Web site. This audit consisted of counting the number of local Web sites, tracking which languages were supported, studying global navigation, and reviewing a number of country sites in detail. This year, we employed proxy software and modified Web browsers to test whether or not Web sites support language negotiation or geolocation. We used proxies for Switzerland, the Netherlands, and the UK. If a company uses geolocation for Asia and not Europe, we would not have recorded this in our analysis.

Do companies pay to participate in this report?

Absolutely not. We select companies for this report based on their size and the fact that they have made an investment in Web localization. Companies that do not support at least two languages on their Web site are not included in the report, regardless of their revenues. Our goal is to survey a wide swath of global companies across all major industries to provide a well-rounded overview of the state of Web globalization.

How can you guarantee that language audits are accurate?

Because the process is conducted manually, we expect a small degree of error in the counting of local Web sites and languages. Also note that Web sites are in a constant state of evolution. Languages and locales may have been added after the site audit

was completed. That said, minor discrepancies in countries and languages generally do not impact the overall score for a given Web site. Finally, some Web sites offer poor global navigation, which may prevent us from identifying all languages and locales supported by that company.

If a Web site does not change from year to year, will its score remain the same?

It is likely that a Web site that does not improve year after year will see its score decrease. This is because the benchmark for what constitutes excellent Web globalization continues to be raised every year.

We improved our Web site over the past year. Why did our score not improve?

There are a number of Web sites in this report whose score did not improve over the past year despite the fact that new local content and features were added. Companies must continually improve the depth of localized content they offer to remain competitive in their industries. When we notice significant increases in content relative to the competition, this is reflected with an increased score.

Does a low score mean the company will do poorly abroad?

Not necessarily. A company that scores poorly in this report may in fact be doing very well around the world. A Web site is just one channel that companies use to market themselves globally and, for some companies, it is not a critical channel.

What if two Web sites receive the same score?

Rating 225 Web sites within a 100-point range means that there will be plenty of Web sites with identical scores. To break a tie, we next look at the total number of languages supported. <mark>Any Web sites that score within five points of one another can be assumed to have rated similarly</mark>.

How do you select companies for your list?

Our list has evolved over the years to include most of the world's leading multinational companies. We also make an effort to include smaller multinationals and start-up companies that have developed impressive global Web sites. If a company currently only supports English, regardless of its revenues, the site is not reviewed in this report. Our focus is only on those companies that have already invested in Web globalization.

What's the value of comparing companies across different industries?

Web globalization best practices may emerge in any industry. By keeping a broad focus on all major industries, we are able to point executives to those companies and industries that are doing the best job of presenting themselves to the world.

What Do the Scores Mean?

Once a Web site is rated, its total score will fall anywhere from 0 to 100.
Here is how the total score relates to a letter grade:

Grade	Total Score
A:	90-100
B:	80-89
C:	70-79
D:	60-69
F:	< 59

Out of all 225 Web sites, the average score was 65, which is actually up
four points from last year, a sign that global Web sites are improving,
particularly in their support for more languages. The exhibit below
illustrates the distribution of scores:

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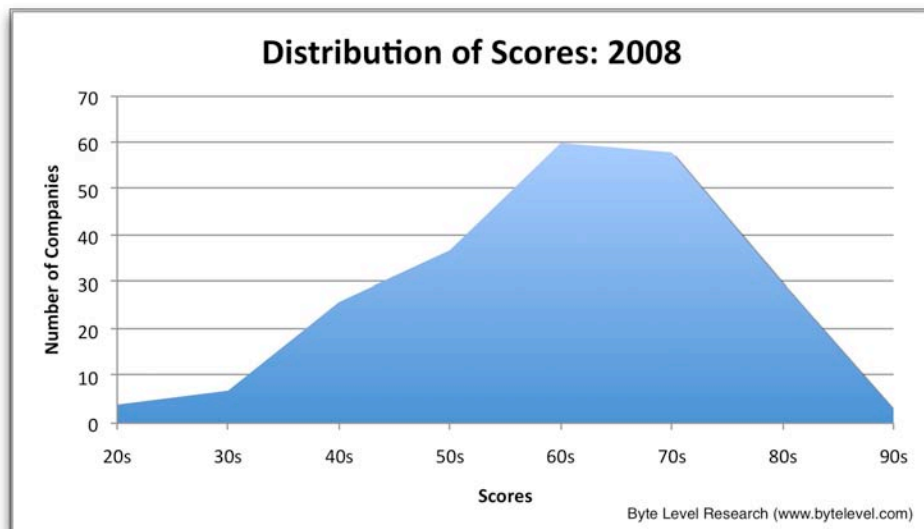
Scores are improving across the board

The exhibit below illustrates the distribution of scores over the past two years. **While just 24 sites scored higher than 80 in 2007, 33 sites scored in this range this year.**
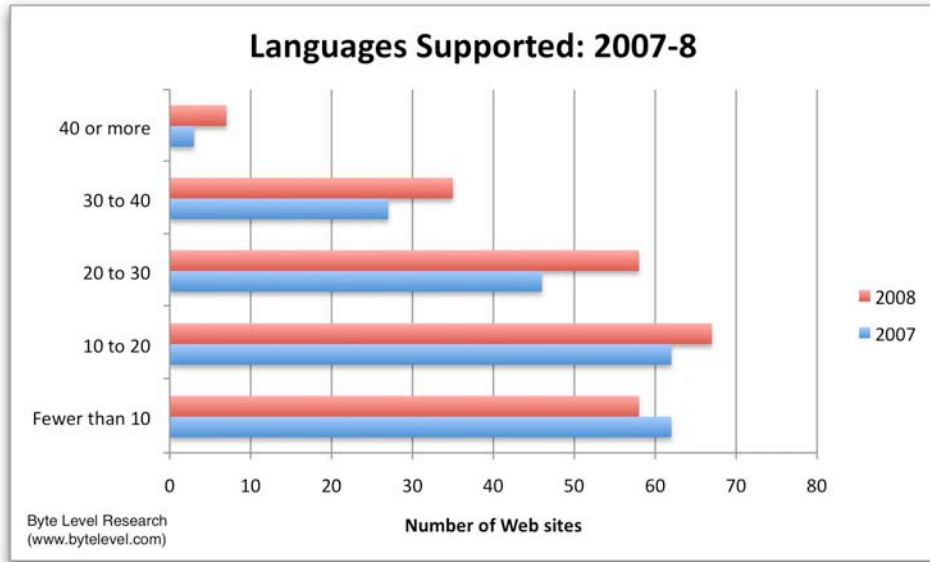
It is also nice to see fewer sites scoring in the 20s and 30s this year.

PART II
THE BEST GLOBAL WEB SITES

The Top 20 Global Web Sites

Out of the 225 Web sites reviewed, here are the top 20 overall, along with their scores.

Rank	Company	Industry Category	URL	Total Score
1	Google	Web Services	www.google.com	96
2	Wikipedia	Web Services	www.wikipedia.org	94
3	Cisco Systems	Business Technology	www.cisco.com	92
4	Volvo	Automotive	www.volvo.com	88
5	Philips	Consumer Technology	www.philips.com	88
6	Caterpillar	Industrial/Diversified	www.cat.com	87
7	Netvibes	Web Services	www.netvibes.com	86
8	Microsoft	Consumer Technology	www.microsoft.com	86
9	HP	Consumer Technology	www.hp.com	86
10	Nokia	Consumer Technology	www.nokia.com	84
11	Deloitte Touche Tohmatsu	Professional Services	www.deloitte.com	84
12	American Express	Financial services	www.americanexpress.com	84
13	Adobe	Consumer Technology	www.adobe.com	84
14	Lenovo	Consumer Technology	www.lenovo.com	84
15	Xbox	Video Games	www.xbox.com	84
16	Panasonic	Consumer Technology	www.panasonic.com	83
17	IBM	Business Technology	www.ibm.com	83
18	3M	Consumer Goods	www.3m.com	83
19	NIVEA	Fashion/Apparel	www.nivea.com	83
20	XING	Social Networking	www.xing.com	83

What impressed us about this list is that no one industry dominates. While technology companies generally do a better job of Web globalization, the fact that companies like Volvo, Caterpillar, American Express, 3M, and NIVEA made the cut indicates that Web globalization best practices can be found anywhere.

What the Best Sites Have in Common

A Web site can't make it into the top 20 simply by offering a dozen languages. In order to make this list, a Web site must demonstrate a combination of global best practices – from languages to navigation to global consistency.

A Wide Global Reach

The top 20 Web sites support more than twice as many languages as the overall average. When you narrow your focus to the top 10 list, the average number of languages supported is 66 – three times the overall average.

	Top 20	All 225 Sites
Avg. Number of Languages	48	20
Avg. Number of Country Web Sites	70	43

Global Consistency

Most of the Web sites in the top 20 received a perfect score in global consistency, which means they leverage global design templates and style sheets across the majority of their country and regional Web sites. Global consistency provides a more credible and reliable experience for Web users who may find themselves beginning at the .com address before moving on to their country Web sites.

Just as important, global consistency allows companies to more easily manage their growing portfolio of localized sites. This approach does not exclude local and regional offices from testing new promotions and features. In fact, global limitations can actually free up local offices to focus less on "reinventing the wheel" and more on creating effective local content.

Excellent Global Navigation

The best global Web sites demonstrate an understanding for the challenges a Web user who does not speak English faces when visiting the .com home page.

Most top 20 sites use visual global gateways on their home pages and, for the most part, on all pages throughout their Web site. Here are the elements currently used by these 20 sites to aid in global navigation:

- **Eight Web sites use splash global gateway pages**: 3M, Caterpillar, Lenovo, NIVEA, Nokia, Philips, Volvo, and Wikipedia.
- **Five Web sites use geolocation**: Caterpillar, Google, Netvibes, Skype, and XING.
- **Four Web sites use language negotiation**: Google, Netvibes, Xbox, and XING.

A Commitment to Getting Better

The sites at the top of the list are not the result of luck. They reflect a high-level commitment to global expansion, communication, and customer support. We find that companies that make it to the top of our rankings generally stay at the top of our rankings because they are continually improving the sites, such as:

- **Adding languages**. Fifteen of the 20 sites added languages last year.
- **Adding content**. Most sites continued to add localized content to their sites, particularly for China and Russia.
- **Improving customer support**. Local-language customer support via email, phone, and chat was also a priority of many sites.

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- **Improving global navigation**. Three of the top 20 sites use both geolocation and language negotiation: Google, Netvibes, and XING.

Once a Web site makes it to the elite list, the odds are pretty good that it will stay in this vicinity, particularly if the company continues to add new localized Web sites and improves global usability.

Google is the only company to make the top 10 list five times in a row. But Google is not alone in making the top 10 list more than once. Companies that have repeated within this list include:

- Caterpillar
- Cisco Systems
- E*TRADE
- HP
- IBM

- IKEA
- Microsoft
- Philips
- Volvo
- Wikipedia

A Commitment to Innovation

Companies at the top of our rankings are generally more open to testing new approaches to Web globalization. For example, Google was the first company to embrace "crowdsourcing" by allowing volunteer translators to help them create localized interfaces. It was only through volunteers that Google was able to take its search engine global so quickly. And now we're seeing Netvibes and Facebook follow a similar path. While this strategy may not be suitable for most companies, it does illustrate the value of rethinking the commonly accepted Web globalization rules and workflow.

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Consider Dell, which now offers product blogs in Spanish, Chinese, and, most recently, Norwegian, shown here:

These local sites are created by native speakers for native speakers and they do not involve the standard translation model of creating content in English and translating it for world markets. The parent-child approach to Web globalization is quickly giving way to a sibling model, in which local and regional offices have more leeway to innovate and create content on their own.

All 225 Web Site Scores

Here are the scores for all 225 Web sites, ranked from highest to lowest. Please note that because 225 sites are all given a score between 0 and 100, there will be Web sites with identical scores. Tie-breaking is based on the total number of languages supported by each site.

<mark>Any Web sites that score within five points of one another can be assumed to have rated similarly. And any Web site that scores above 80 is in excellent company</mark>.

Rank	Company	URL	Score
1	Google	www.google.com	96
2	Wikipedia	www.wikipedia.org	94
3	Cisco Systems	www.cisco.com	92
4	Volvo	www.volvo.com	88
5	Philips	www.philips.com	88
6	Caterpillar	www.cat.com	87
7	Netvibes	www.netvibes.com	86
8	Microsoft	www.microsoft.com	86
9	HP	www.hp.com	86
10	Nokia	www.nokia.com	84
11	Deloitte Touche Tohmatsu	www.deloitte.com	84
12	American Express	www.americanexpress.com	84
13	Adobe	www.adobe.com	84
14	Lenovo	www.lenovo.com	84
15	Xbox	www.xbox.com	84
16	Panasonic	www.panasonic.com	83
17	IBM	www.ibm.com	83
18	3M	www.3m.com	83
19	NIVEA	www.nivea.com	83
20	XING	www.xing.com	83
21	Skype	www.skype.com	82
22	Seagate	www.seagate.com	82
23	Mini	www.mini.com	81
24	Last.fm	www.last.fm	81
25	PricewaterhouseCoopers	www.pwcglobal.com	80
26	Procter & Gamble	www.pg.com	80

27	Saab	www.saab.com	80
28	UPS	www.ups.com	80
29	IKEA	www.ikea.com	80
30	Symantec	www.symantec.com	80
31	European Union	www.europa.eu	80
32	John Deere	www.deere.com	80
33	PayPal	www.paypal.com	80
34	Voice of America	www.voanews.com	79
35	DHL	www.dhl.com	79
36	BBC	www.bbc.com	79
37	Sun	www.sun.com	79
38	Motorola	www.motorola.com	79
39	Kodak	www.kodak.com	79
40	Oracle	www.oracle.com	78
41	Dell	www.dell.com	78
42	Citibank	www.citi.com	78
43	Colgate	www.colgate.com	78
76	Autodesk	www.autodesk.com	78
44	Texas Instruments	www.ti.com	78
45	Salesforce.com	www.salesforce.com	78
46	TNT	www.tnt.com	77
47	Black & Decker	www.blackanddecker.com	77
48	Intel	www.intel.com	77
49	McAfee	www.mcafee.com	77
63	eFax	www.efax.com	77
50	Dow Corning	www.dowcorning.com	77
51	Renesas	www.renesas.com	77
52	Yahoo!	www.yahoo.com	76
53	GE	www.ge.com	76
54	Cargill	www.cargill.com	76
55	MySpace	www.myspace.com	76
56	Starwood Hotels	www.starwood.com	76
57	Nissan	www.nissan-global.com	75
58	Canon	www.canon.com	75
59	Merck	www.merck.com	75
60	FedEx	www.fedex.com	75
61	AMD	www.amd.com	75
62	Adidas	www.adidas.com	75
64	Alcoa	www.alcoa.com	74
65	Smart	www.smart.com	74
66	Avaya	www.avaya.com	74
67	Palm	www.palm.com	74
68	LG	www.lge.com	73
69	Jaguar	www.jaguar.com	73

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70	World Bank	www.worldbank.org	73
71	Orkut	www.orkut.com	73
72	Ebay	www.ebay.com	73
73	Emirates	www.emirates.com	73
74	WebEx	www.webex.com	73
75	BMW	www.bmw.com	72
77	Samsung	www.samsung.com	72
78	MSN	www.msn.com	72
79	SAS	www.sas.com	72
80	NVIDIA	www.nvidia.com	72
81	Mercedes	www.mercedes.com	71
82	Best Western	www.bestwestern.com	71
83	British Airways	www.british-airways.com	71
84	AOL	www.aol.com	71
85	Siemens	www.siemens.com	70
86	Volkswagen	www.vw.com	70
87	KPMG	www.kpmg.com	70
88	E*TRADE	www.etrade.com	70
89	Hertz	www.hertz.com	70
90	OCLC	www.oclc.org	70
91	Flickr	www.flickr.com	70
92	Avon	www.avon.com	69
93	Northwest Airlines	www.nwa.com	69
94	3Com	www.3com.com	69
95	LexisNexis	www.lexisnexis.com	69
96	United Nations	www.un.org	69
97	Steelcase	www.steelcase.com	68
98	Ernst & Young	www.ey.com	68
99	Subway	www.subway.com	68
100	Business Objects	www.businessobjects.com	68
101	American Airlines	www.aa.com	68
102	Hyundai	www.hyundai.com	67
103	SAP	www.sap.com	67
104	Harry Potter	harrypotter.warnerbros.com	67
105	BMC Software	www.bmc.com	67
106	CSFB	www.csfb.com	67
107	Ryanair	www.ryanair.com	67
108	Coca-Cola	www.coke.com	66
109	Toshiba	www.toshiba.com	66
110	Lexus	www.lexus.com	66
111	EMC	www.emc.com	66
112	Apple	www.apple.com	66
113	Snapfish	www.snapfish.com	66
114	Marriott	www.marriott.com	66

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115	Xerox	www.xerox.com	65
116	Playstation	www.playstation.com	65
117	InterContinental Hotels	www.ichotelsgroup.com	65
118	Wacom	www.wacom.com	65
119	Unilever	www.unilever.com	64
120	Iams	www.iams.com	64
121	Build-a-Bear	www.buildabear.com	64
122	Bose	www.bose.com	64
123	Radisson	www.radisson.com	64
124	Huawei	www.huawei.com	64
125	Nintendo Wii	www.wii.com	64
126	Continental	www.continental.com	64
127	Wyeth	www.wyeth.com	63
128	Creative	www.creative.com	63
129	Western Union	www.westernunion.com	63
130	Amazon	www.amazon.com	63
131	Audi	www.audi.com	62
132	Amway	www.amway.com	62
133	Purina	www.purina.com	62
134	Novell	www.novell.com	62
135	Siemens Medical	www.medical.siemens.com	62
136	Nike	www.nike.com	62
137	Sanofi-Aventis	www.aventis.com	61
138	KLM	www.klm.com	61
139	Capgemini	www.capgemini.com	61
140	Air France	www.airfrance.com	61
141	Reebok	www.reebok.com	61
142	Cemex	www.cemex.com	61
143	Hyatt	www.hyatt.com	61
144	Tiffany	www.tiffany.com	61
145	Whirlpool	www.whirlpool.com	60
146	ING	www.ing.com	60
147	Eli Lilly	www.lilly.com	60
148	Accor Hotels	www.accorhotels.com	60
149	United Airlines	www.united.com	60
150	National	www.national.com	60
151	Pageflakes	www.pageflakes.com	60
152	Yamaha	www.yamaha.com	59
153	Monster	www.monster.com	59
154	Cadillac	www.cadillac.com	59
155	Sol Melia	www.solmelia.com	59
156	Sony	www.sony.com	58
157	NEC	www.nec.com	58
158	Honeywell	www.honeywell.com	58

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159	Crocs	www.crocs.com	58
160	Warner Brothers	www.warnerbrothers.com	58
161	BlackBerry (RIM)	www.blackberry.com	58
162	Medtronic	www.medtronic.com	57
163	Loréal	www.loreal.com	57
164	Freescale	www.freescale.com	57
165	Chanel	www.chanel.com	57
166	HSBC	www.hsbc.com	57
167	Software AG	www.softwareag.com	56
168	Briggs & Stratton	www.briggsandstratton.com	56
169	Hotels.com	www.hotels.com	55
170	Cartier	www.cartier.com	55
171	Columbia	www.columbia.com	55
172	Polo	www.polo.com	55
173	Fairchild Semiconductor	www.fairchildsemi.com	55
174	Bayer	www.bayer.com	54
175	Novartis	www.novartis.com	54
176	Chubb	www.chubb.com	54
177	Expedia	www.expedia.com	54
178	Broadcom	www.broadcom.com	54
179	New Balance	www.newbalance.com	53
180	Monsanto	www.monsanto.com	53
181	Jones Day	www.jonesday.com	53
182	Dollar Rent A Car	www.dollar.com	53
183	Nikon	www.nikon.com	52
184	CNN	www.cnn.com	52
185	NXP Semiconductors	www.nxp.com	51
186	Godiva	www.godiva.com	51
187	Toyota	www.toyota.com	50
188	Lancôme	www.lancome.com	50
189	Estée Lauder	www.esteelauder.com	49
190	Tommy Hilfiger	www.tommy.com	49
191	Starbucks	www.starbucks.com	48
192	Genzyme	www.genzyme.com	48
193	Hilton	www.hilton.com	48
194	Analog Devices	www.analog.com	48
195	McDonald's	www.mcdonalds.com	47
196	Louis Vuitton	www.louisvuitton.com	46
197	Ask	www.ask.com	46
198	Morgan Stanley	www.morganstanley.com	46
199	Nestlé	www.Nestlé.com	45
200	Prudential	www.prudential.com	45
201	ESPN	www.espn.com	45
202	Honda	www.honda.com	44

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203	Thrifty	www.thrifty.com	44
204	Levi's	www.levi.com	43
205	KitchenAid	www.kitchenaid.com	43
206	Heineken	www.heineken.com	42
207	Bearing Point	www.bearingpoint.com	42
208	Facebook	www.facebook.com	42
209	Fidelity	www.fidelity.com	41
210	Boston Scientific	www.bostonscientific.com	41
211	Carnival Cruise Lines	www.carnival.com	41
212	Pfizer	www.pfizer.com	40
213	evian	www.evian.com	40
214	ST Microelectronics	www.st.com	40
215	Disney	www.disney.com	39
216	Patagonia	www.patagonia.com	39
217	Goldman Sachs	www.goldmansachs.com	38
218	Four Seasons	www.fourseasons.com	37
219	Haier	www.haier.com	35
220	Sherwin-Williams	www.sherwin.com	35
221	Budweiser	www.budweiser.com	30
222	McKinsey & Co	www.mckinsey.com	29
223	Wal-Mart	www.walmart.com	29
224	Maytag	www.maytag.com	28
225	J. Crew	www.jcrew.com	23

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PART III
FINDINGS AND TRENDS

Languages: How Many?

When we first began tracking language use in 2002, Google was the leader at roughly 50 languages. Most other Web sites supported fewer than 10 languages.

Since then, companies have been steadily adding to their portfolio of languages, at a growth rate of between 20% and 30% per year.

This year, the 225 Web sites averaged 20 languages – up from 18 in 2007.
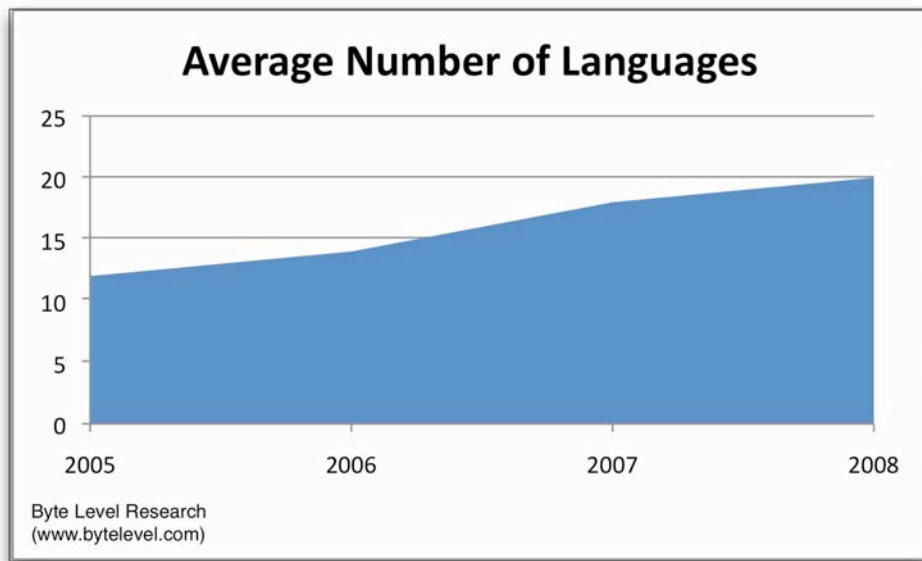
Most sites saw an increase of between one and three languages over
the past year, but a number of sites were well above that. Below are the
sites that showed the greatest increase in languages over the past
year:
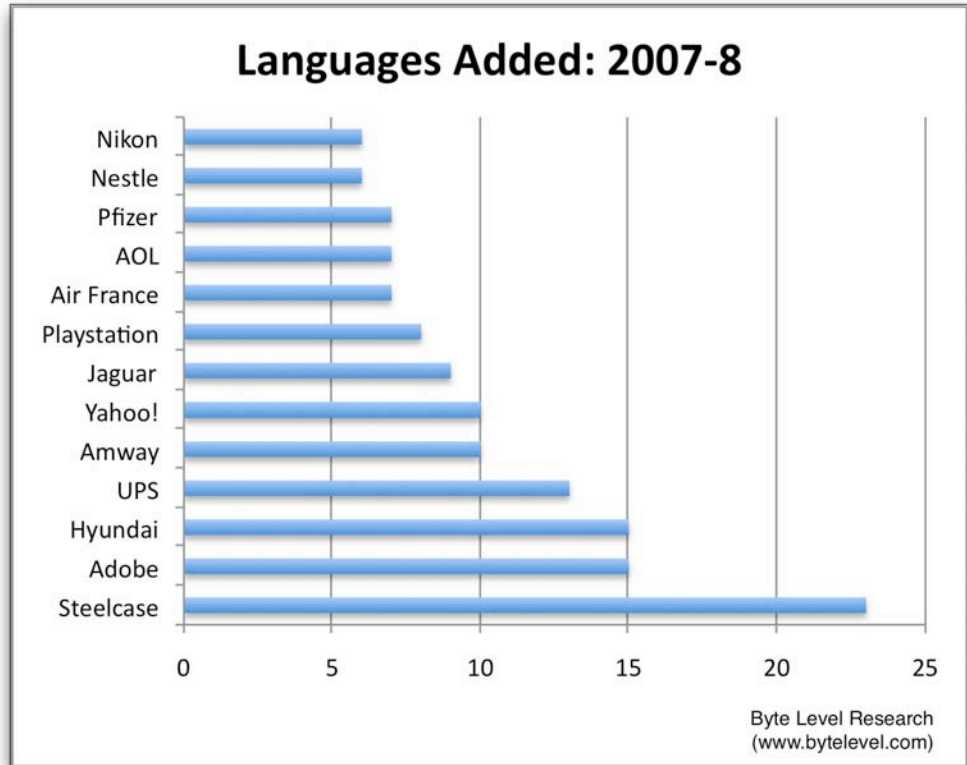
For the first year, the number of Web sites supporting 10 or fewer languages decreased. As shown below, we saw the largest increase in the number of Web sites supporting between 20 to 30 languages:
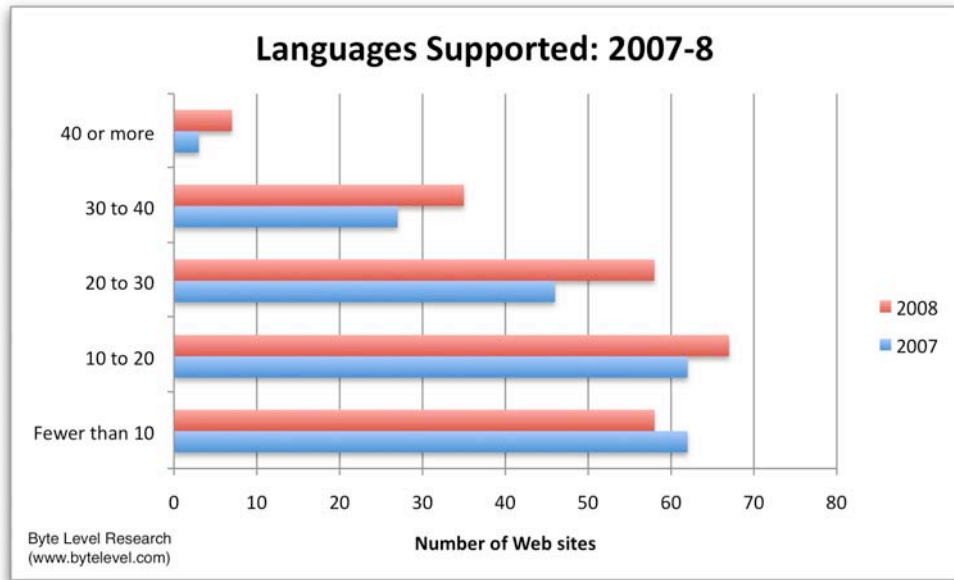
The rate of language growth often reflects where a given company stands in the "language growth curve." This curve begins rather steep, as companies ramp up quickly in the core European and Asian languages. After a company reaches 20 languages, the curve begins to taper off gradually. Most companies are still in the earlier stages of this growth curve. We also saw an increase in the number of sites supporting 40 or more languages, though the list is still quite short :

- Google
- Honda
- Microsoft
- Netvibes

- Toyota
- Voice of America
- Wikipedia

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Here is the complete list of all companies that saw either an increase or decrease in the number of languages supported in the past year.

Number of Languages, 2006 to 2008

Company	2006	2007	2008	Change from 2007
Steelcase	6	6	29	+23
Adobe	15	16	31	+15
Hyundai	22	23	38	+15
UPS	13	13	26	+13
Amway	21	21	31	+10
Yahoo!	16	21	31	+10
Jaguar	15	15	24	+9
Playstation	13	14	22	+8
Air France	9	10	17	+7
AOL	7	7	14	+7
Pfizer	16	18	25	+7
Nestlé	28	28	34	+6
Nikon	15	15	21	+6
Sanofi-Aventis	18	20	26	+6
Wikipedia	150	250	256	+6
Xbox	14	16	22	+6
Avaya	15	16	21	+5
Bayer	21	21	26	+5
Deloitte Touche Tohmatsu	26	28	33	+5
Honda	35	36	41	+5
Lexus	21	21	26	+5
Novell	16	16	21	+5
Salesforce.com	8	5	10	+5
Subway	12	13	18	+5
Western Union	7	7	12	+5
Best Western	13	15	19	+4
Coca-Cola	30	31	35	+4
Ernst & Young	20	20	24	+4
Hotels.com	12	12	16	+4
John Deere	15	16	20	+4
Medtronic	19	19	23	+4
Monster	12	15	19	+4
MSN	24	24	28	+4
Nissan	30	31	35	+4
NIVEA	24	26	30	+4

World Bank	13	15	19	+4
American Express	26	29	32	+3
Bearing Point	6	9	12	+3
Bose	1	9	12	+3
Build-a-Bear	7	10	13	+3
Canon	27	27	30	+3
Chubb	7	8	11	+3
Dell	25	26	29	+3
Expedia	5	8	11	+3
Harry Potter	10	21	24	+3
Huawei	2	5	8	+3
Iams	19	19	21	+3
Lenovo	18	23	26	+3
LG	25	26	29	+3
Merck	24	24	27	+3
Monsanto	5	8	11	+3
PayPal	5	7	10	+3
Procter & Gamble	26	30	33	+3
Purina	22	23	26	+3
Samsung	30	30	33	+3
Sony	35	35	38	+3
Texas Instruments	6	7	10	+3
TNT	30	31	34	+3
Tommy Hilfiger	2	2	5	+3
Whirlpool	18	19	22	+3
Adidas	12	12	14	+2
Apple	16	16	18	+2
Audi	31	31	33	+2
Colgate	24	24	26	+2
E*TRADE	11	12	14	+2
Ebay	12	13	15	+2
FedEx	19	20	22	+2
Genzyme	8	8	10	+2
Google	115	115	117	+2
Hertz	9	12	14	+2
ING	19	19	21	+2
KLM	18	18	20	+2
KPMG	24	27	29	+2
Levi's	11	11	13	+2
Loréal	16	17	19	+2
Louis Vuitton	4	4	6	+2
McAfee	16	16	18	+2
McDonald's	24	24	26	+2
Mercedes	36	36	38	+2

Radisson	6	7	9	+2
Reebok	15	15	17	+2
Starwood Hotels	4	4	6	+2
Toshiba	25	26	28	+2
WebEx	5	6	8	+2
Wyeth	18	20	22	+2
American Airlines	8	9	10	+1
Avon	34	34	35	+1
Black & Decker	23	23	24	+1
BlackBerry (RIM)	5	7	8	+1
BMW	38	38	39	+1
Boston Scientific	7	6	7	+1
Briggs & Stratton	10	10	11	+1
Business Objects	14	11	12	+1
Capgemini	19	19	20	+1
Chanel	10	10	11	+1
Cisco Systems	34	37	38	+1
Citibank	24	26	27	+1
Columbia	6	9	10	+1
Continental	4	5	6	+1
Creative	20	20	21	+1
Emirates	8	10	11	+1
ESPN	2	2	3	+1
European Union	19	22	23	+1
evian	4	4	5	+1
Freescale	11	12	13	+1
GE	24	24	25	+1
IBM	32	33	34	+1
Intel	19	20	21	+1
InterContinental Hotels	12	12	13	+1
KitchenAid	6	7	8	+1
Lancôme	15	15	16	+1
Maytag	2	2	3	+1
Microsoft	39	40	41	+1
Motorola	26	27	28	+1
Nike	15	15	16	+1
Nokia	35	36	37	+1
Northwest Airlines	21	20	21	+1
Palm	10	10	11	+1
Panasonic	34	34	35	+1
Polo	8	8	9	+1
Renesas	4	4	5	+1
SAS	23	23	24	+1
Starbucks	10	11	12	+1

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Toyota	39	39	40	+1
United Airlines	6	6	7	+1
Warner Brothers	8	8	9	+1
Skype	21	25	24	-1
Symantec	16	24	23	-1
Thrifty	3	3	2	-1
Wal-Mart	7	7	6	-1
Sol Melia	9	10	8	-2
Accor Hotels	9	12	8	-3

Please note that English is not counted. Source: Byte Level Research

Out of the 200 sites tracked, 126 sites increased languages while 6 sites decreased the number of languages they support.

Why did some Web sites lose languages?

It some cases, companies have simply pulled out of a given market – like Wal-Mart leaving Germany – or their local offices have not maintained the local sites properly. We have also witnessed instances in which companies temporarily took down the localized sites while undergoing a global redesign.

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Languages: What's Hot?

While reviewing Web sites, we made a note of every language that each Web site supports. This information sheds light on what languages are most popular and, combined with historical data, which languages are gaining in popularity.

We tracked 60 languages in all, listed below:

Albanian	Gujarati
Arabic	Hebrew
Azeri	Hindi
Bengali	Hungarian
Bosnian	Icelandic
Bulgarian	Indonesian (Bahasa)
Catalan	Italian
Chinese (Simplified)	Japanese
Chinese (Traditional)	Kannada
Chinese (US)*	Korean
Croatian	Latvian
Czech	Lithuanian
Danish	Macedonian
Dutch	Malayalam
Estonian	Maltese
Farsi	Marathi
Finnish	Montenegrin
French	Norwegian
French (Canada)*	Polish
Gaelic	Portuguese (Brazil)
German	Portuguese (Portugal)
Greek	Punjabi

Romanian	Swedish
Russian	Tamil
Serbian	Telugu
Slovak	Thai
Slovenian	Turkish
Spanish (LatAm)*	Ukrainian
Spanish (Spain)*	Urdu
Spanish (US)*	Vietnamese

*We note geographic variations of languages for French, Spanish, and Chinese. For French, the differences between the language used in Canada and in France are quite pronounced.

With Spanish, there are many variations based on the country it is used, such as Spain, Puerto Rico, Argentina, and Mexico. To make the most of translation spending, companies are increasingly using a "universal" Spanish for the US, Mexico, and many Latin American countries. For the purposes of this report, we simply note whether a Web site offers a Spanish-language site specifically for residents of the US, without looking at the flavor of Spanish used.

For Chinese in the US, we do not differentiate between Traditional and Simplified. Over the past few years, the Chinese directed at US residents has been Traditional Chinese, directed at immigrants from Taiwan. However, it is likely that we'll see Simplified Chinese used on US sites in the years ahead as immigrants from China increase in number and, more important, in buying power.

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Here are the top 20 languages overall, based on the percentage of Web sites that support them:

Most Popular Languages

Byte Level Research
(www.bytelevel.com)

Percentage of Web sites that support the language
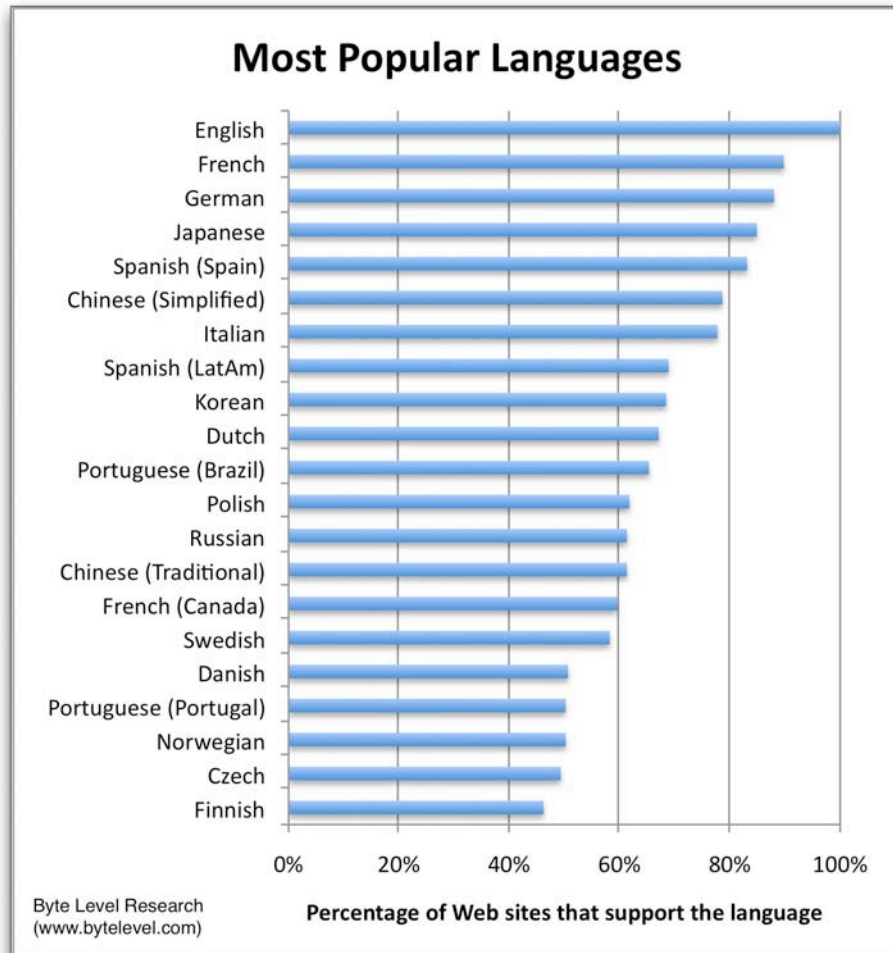
To the right is a complete list of languages tracked, ranked by their frequency across all 225 Web sites.

English is Ubiquitous

The reason we don't count English as a separate language is because every one of the Web sites studied supports English. One of the ironies of Web globalization is that English has become the default language of choice, even on corporate Web sites of companies that are not based in an English speaking country.

A small number of Web sites offer a choice between British and American English, but the overwhelming majority of Web sites make no such distinction.

Rank	Language	Frequency
1	English	225
2	French	202
3	German	198
4	Japanese	191
5	Spanish (Spain)	187
6	Chinese (Simplified)	177
7	Italian	175
8	Spanish (LatAm)	155
9	Korean	154
10	Dutch	151
11	Portuguese (Brazil)	147
12	Polish	139
13	Chinese (Traditional)	138
14	Russian	138
15	French (Canada)	134
16	Swedish	131
17	Danish	114
18	Norwegian	113
19	Portuguese (Portugal)	113
20	Czech	111
21	Finnish	104
22	Turkish	103
23	Hungarian	100
24	Greek	80
25	Slovak	73
26	Romanian	69
27	Thai	59
28	Ukrainian	57
29	Slovenian	54
30	Hebrew	50
31	Estonian	47
32	Bulgarian	47
33	Croatian	45
34	Latvian	43
35	Lithuanian	41
36	Arabic	38
37	Spanish (US)	37
38	Serbian	29
39	Indonesian	29
40	Icelandic	28
41	Vietnamese	27
42	Macedonian	15
43	Bosnian	14
44	Farsi	10
45	Hindi	10
46	Albanian	9
47	Tamil	8
48	Chinese (US)	7
49	Bengali	6
50	Montenegrin	5
51	Catalan	5
52	Telugu	5
53	Malayalam	4
54	Urdu	4
55	Gaelic	3
56	Azeri	3
57	Maltese	3
58	Marathi	3
59	Gujarati	3
60	Kannada	3
61	Punjabi	3

Key Findings

Chinese climbs into 6th place

This year, Chinese (Simplified) was found on 79% of all Web sites, moving the language up from 7th place last year.

Emerging-market languages are hot

Companies are focused on emerging economies, and this is reflected in the languages they are adding to their sites. While all languages have seen growth in usage since last year, it is languages such as Ukrainian, Polish, and Turkish that have seen the greatest relative increases.
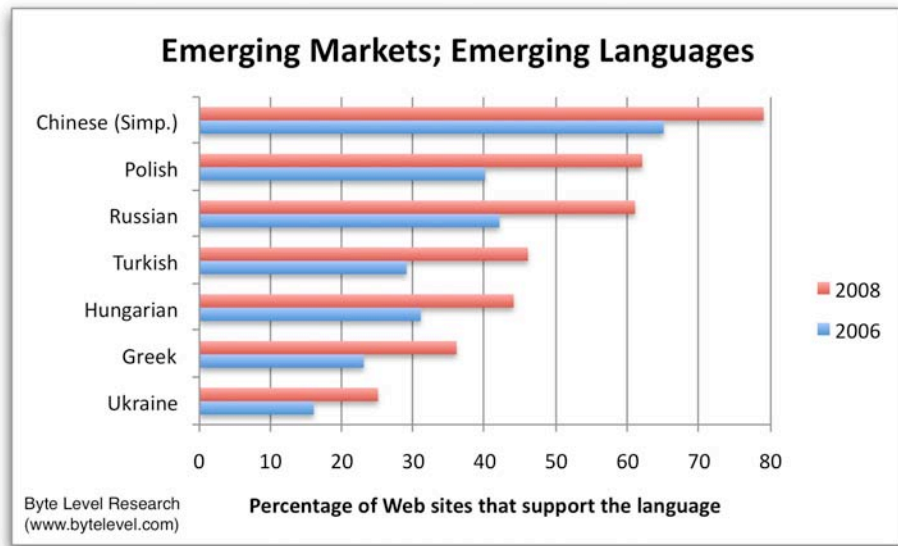
The expansion of the European Union also plays into this trend, as the EU requires companies within regulated industries, such as pharmaceuticals and medical devices, to provide documentation in all EU languages.

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Arabic growth slows

Arabic was seen on 11% of all Web sites studied in 2005 and was seen on 17% of all sites in 2007. And yet this year the language remained at 17%, a sign that companies are more focused on Eastern Europe and Asia than on the Middle East.

Brazilian Portuguese breaks into the Top 10

Brazil's booming economy is luring more and more multinationals, so it's no surprise that Brazilian Portuguese was ranked 10th this year, up from 18th last year.

Technology companies lead in languages

When we compare industry categories by the average number of languages each supports, the technology-oriented industries occupy the top of the list. Here are the averages of categories that include eight or more companies:

Category	Avg. # of Languages
Web Services	33
Automotive	32
Consumer Technology	26
Business Technology	22
Consumer Products	22
Professional Services	21
Medical/Pharma	20
Industrial/Diversified	18
Financial Services	13
Airlines	13
Retail/Restaurant	12
Hotels/Resorts	8
Semiconductor	8

Global Navigation: The Top 25

Global navigation is such an important aspect of successful Web globalization that we devoted an e-book to the topic: *The Art of the Global Gateway.* **This book is available free to all purchasers of this report; please contact John Yunker at jyunker@byelevel.com to receive your copy.** Here are the leading Web sites in terms of global navigation:

Global Navigation Top 25

Rank	Company	Score
1	Caterpillar	25
2	XING	25
3	Dow Corning	24
4	Philips	23
5	Xbox	23
6	NIVEA	23
7	Seagate	23
8	Last.fm	23
9	McAfee	23
10	Adidas	23
11	Lenovo	22
12	Symantec	22
13	AMD	22
14	Starwood Hotels	22
15	Renesas	22
16	Palm	22
17	eFax	21
18	Google	21
19	John Deere	21
20	Kodak	21
21	Cisco Systems	20
22	Netvibes	20
23	Microsoft Live	20
24	Panasonic	20
25	American Express	20

Source: Byte Level Research

Only two companies achieved a perfect score: **Caterpillar** and **XING**.

Where did XING come from?

Past readers of this report are familiar with the Caterpillar Web site, which has scored number one in global navigation for the past three years. This year, Caterpillar tied for first place with a start-up social networking site called XING (www.xing.com).

What makes XING so special is that it relies on both geolocation and language negotiation in addition to a visual global gateway. Shown below is the global gateway. Notice the use of a map icon and the languages presented in their native script.

This gateway allows users to change their language preference. But often that isn't necessary because XING guesses it based on the language preference of the user's browser.

Because it is a networking site, XING allows you to decide if you want to connect with users outside of your native language and vice versa – as well as your home country. It's a very sophisticated model that takes into account both language and country and allows the user a fair amount of flexibility and personalization.

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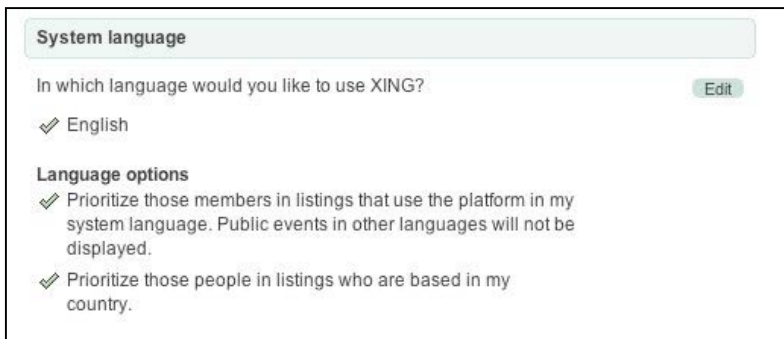
Caterpillar and the splash global gateway

For companies that aren't using geolocation and language negotiation, we recommend studying Caterpillar's global gateway. Although Caterpillar does use geolocation, it also relies on a splash global gateway so Web users can self-select their locale.

This gateway does three things quite nicely:

- The local links are provided in the end user's language.
- The gateway does not exhibit preference for any one country or region.
- The country selected is saved as a cookie on the Web user's computer so return visits bypass this landing page. Should the user need to change preference, the global gateway link is perfectly positioned in the "sweet spot." This link is included on every Caterpillar Web page.

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Splash Global Gateway Usage

Over the past four years, the number of Web sites using splash global gateways has increased significantly – from less than 1% in 2003 to 28% in 2007.

This year, we noticed a slight drop in the percentage of sites using splash gateways – to 26%.

The reason for the drop is that we increased the number of sites studied this year by 25 – only one of which has a splash global gateway, Siemens Medical. If we remove those 25 sites from the analysis, the percentage stays roughly the same as last year.

Why didn't more companies adopt the splash gateway? We have found that increased usage of geolocation and language negotiation has given some companies less of a reason to adopt a splash gateway page.

Splash Global Gateways 2008

Splash Gateway 26%

No Splash Gateway 74%

Byte Level Research (www.bytelevel.com)
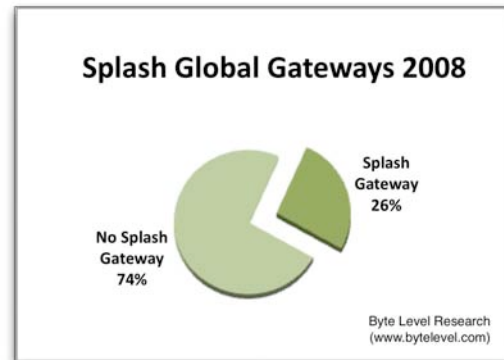
That said, we maintain that a splash global gateway, properly executed, is an excellent navigation tool and has served most of the 54 companies in this report that do use it quite nicely. We do anticipate continued growth in usage, but probably no more than a few percentage points over the next year.

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Here are the companies currently using splash global gateways:

3M	Honeywell	NIVEA
Air France	Hyundai	Nokia
BMW	Iams	Patagonia
Briggs & Stratton	IKEA	Philips
British Airways	Jaguar	Playstation
Canon	KLM	Purina
Cartier	Lenovo	Reebok
Caterpillar	LexisNexis	Renesas
Chanel	LG	Saab
Coca-Cola	Loréal	Samsung
CSFB	Louis Vuitton	Siemens Medical
DHL	McDonald's	Smart
EMC	Mercedes	Tiffany
Emirates	Mini	United Nations
European Union	New Balance	UPS
evian	Nike	Volvo
FedEx	Nikon	Western Union
Goldman Sachs	Nintendo Wii	Wikipedia

Flags, Globes, and Other Visuals

Visual elements can significantly improve the usability of a Web site's global navigation. However, there are a number of visuals that can be used, from flags to globe icons to maps of the world.

To better understand how companies are using these visuals, if at all, we tracked their usage and found that more than half of all Web sites do rely on some sort of visual to aid in global navigation.

This percentage is largely consistent with the previous year. There was a slight uptick in the number of sites using maps, but nothing significant.

While we prefer to use a globe icon, as it reproduces well in small sizes, as you will see on the next page, both map and globe can be successfully implemented.

Global Navigation Visuals

Globe 7%
Flags 18%
No Visuals 47%
Map 28%

Byte Level Research
(www.bytelevel.com)
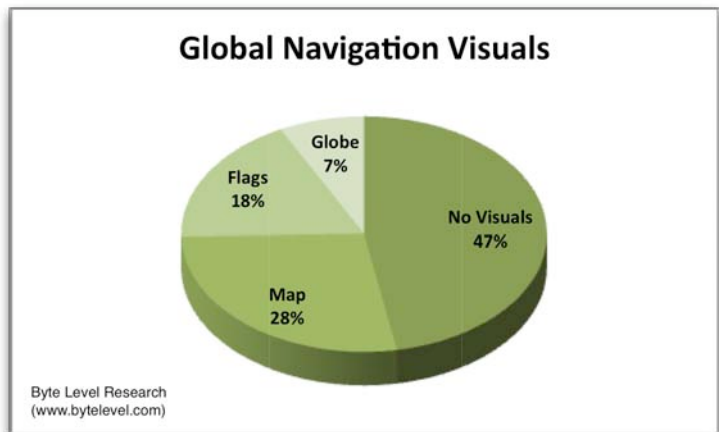
On the next page are the global navigation visuals used by Web sites ranked in the top 25.

XING

Language

AMD

Worldwide

Philips

About Philips

Seagate

| CHANGE ⌄

Caterpillar

中国 [选择]

NIVEA

Global Sites

Dow Corning

Global (English). Change

Xbox

Magyarország   Nemzetközi

Adidas

Welcome to adidas United States
Change Location
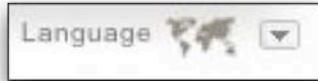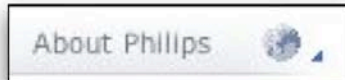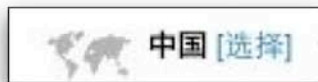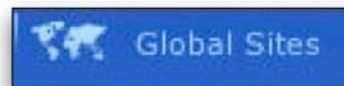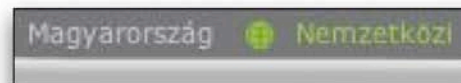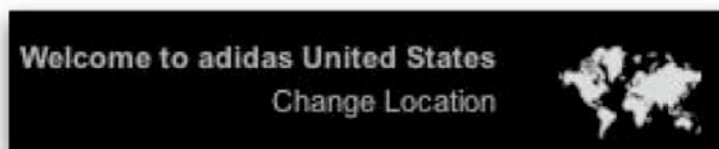
Language Negotiation Still Emerging

When Internet users visit your company's Web site, the odds are high that their Web browsers are requesting content in a specific language. That's because most browsers are automatically configured for a certain language preference, which can be overridden by the user, as shown in the Firefox (Macintosh) window below:
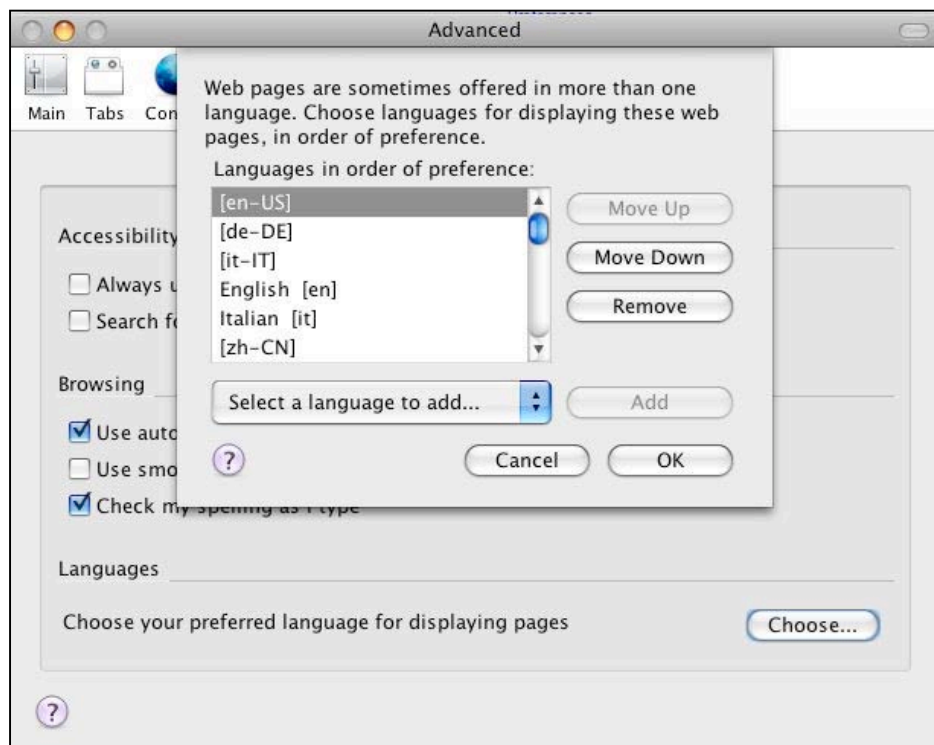
A Web server may be configured to detect the Web browser preference and respond with content in that matching language, if it is available. This process is known as language negotiation (or content negotiation).

Google was one of the earliest companies to make widespread use of language negotiation.

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In 2007, we detected language negotiation being used by the following companies:

- Accor Hotels
- CSFB
- Kodak
- Levi's Europe
- Salesforce.com
- Starwood Hotels
- Xbox

This year, the companies above continue to use language negotiation, joined by these additional companies:

- BMW
- eFax
- Flickr
- Last.fm
- Microsoft Live
- McAfee
- Mercedes
- Netvibes
- Orkut
- Pageflakes
- Ryanair
- Xing

While 19 Web sites is still a relatively small number compared to the 225 sites reviewed, the trend has taken hold. More important, those companies that have been using language negotiation for a year or longer continue to do so, indicating that the technology has proven itself.

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Geolocation Has Emerged

Every Web user who visits your site also has an IP address that indicates where he or she is based. Geolocation is the process of mapping the user's IP address to a specific geographic location. As in language negotiation, Google was also a pioneer in using geolocation. Today, Google is also far from alone. In 2007, we detected the following five companies using geolocation:

- Amazon
- Caterpillar
- Expedia
- Google
- Skype

This year, we detected these additional Web sites using geolocation:

- Adidas
- Ask.com
- Bose
- CNN
- Continental
- Creative
- CSFB
- Disney
- eFax
- Hertz
- Hotels.com
- InterContinental Hotels
- Monster
- MySpace

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- Netvibes
- NIVEA
- PayPal
- Sony
- Steelcase
- Xing.com
- Yahoo!

Out of the 225 sites reviewed, 26 now use geolocation, a ratio of more than one in ten.

Geolocation can be used in a variety of ways. As shown here, CNN uses geolocation to direct Web users based outside of the US to visit the CNN International Web site instead of the US version located at CNN.com
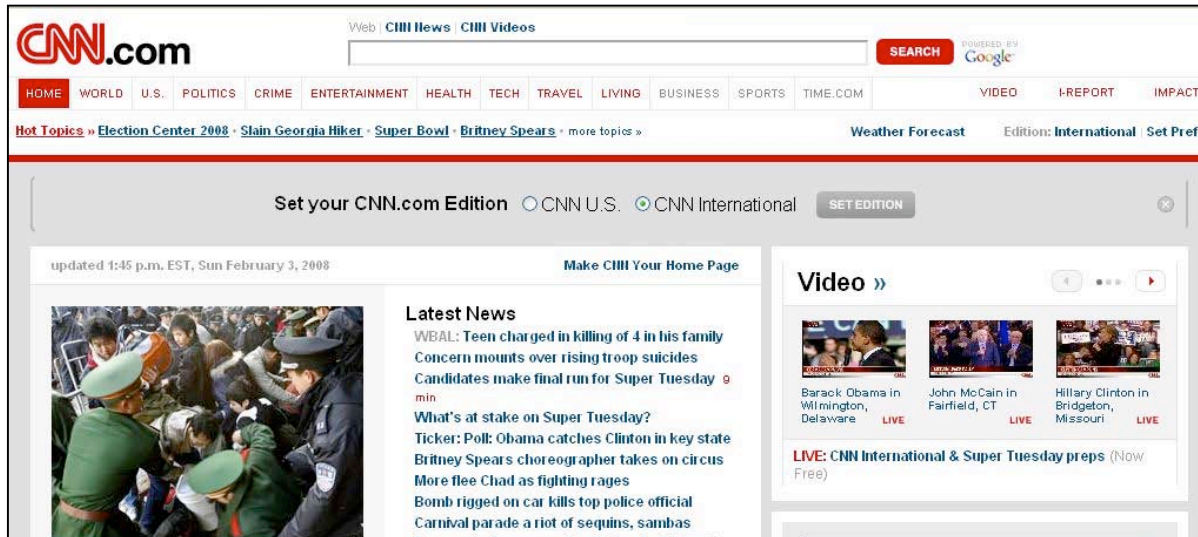
In testing geolocation, we used several proxies that would trick the
server into thinking that we were accessing the Internet from various
countries. The exhibit below shows how Amazon.com responds to a
Web request from the Netherlands.

Here is what Sony displayed when we visited **www.sony.com**, also from the Netherlands proxy.
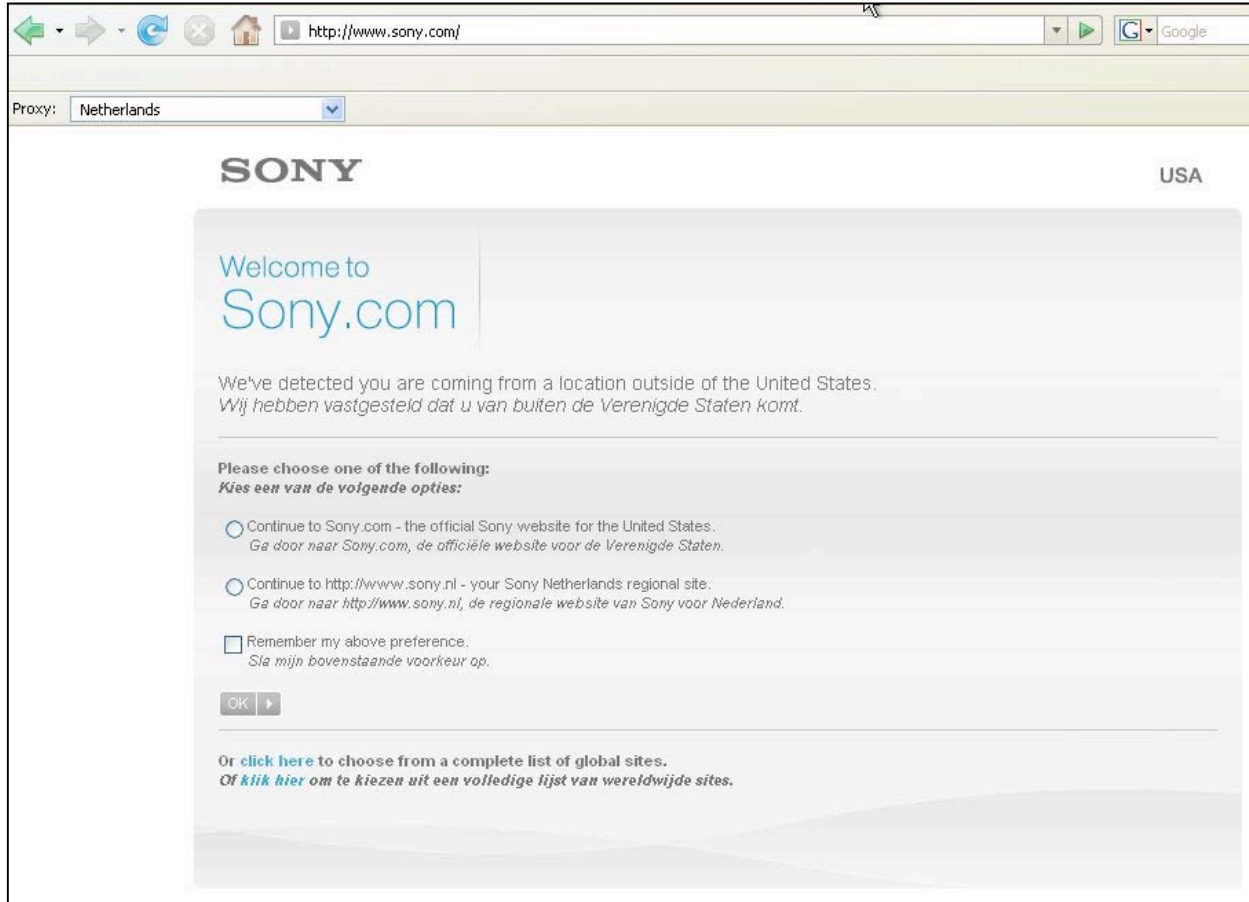
Sony does not look at the Web browser's language preference, just the IP address. Even when we changed our browser's language preference to Dutch/Netherlands, we still were presented with this splash page. What this means is that Sony views its .com address as synonymous with the US Web site.

Geolocation does not perfectly identify all IP addresses. For example, AOL users are generally detected as originating from Virginia due to how the ISP directs its users to the Internet. However, we have found that geolocation is generally quite accurate – up to 97%, or higher.

There are a number of companies that provide databases of geolocation information and/or services, such as Akamai, Quova, MaxMind, and IP2Location.

Global Consistency: The Top 62

More and more companies are making use of a global design template, illustrated by the fact that 62 Web sites recorded a perfect score in this category, shown here:

Global Consistency: Web Sites With Perfect Scores

Google	Google	Oracle
Adidas	Huawei	Orkut
Adobe	IBM	Palm
AMD	Intel	PayPal
American Airlines	John Deere	Philips
AOL	Jones Day	PricewaterhouseCoopers
Apple	KPMG	Renesas
Autodesk	Last.fm	Salesforce.com
Avaya	Lenovo	SAP
BMC Software	McAfee	SAS
Caterpillar	Merck	Seagate
Cisco Systems	Microsoft Live	Smart
Continental	Mini	Steelcase
Deloitte	MSN	Sun
eFax	MySpace	Symantec
EMC	Netvibes	Texas Instruments
Emirates	NIVEA	United Airlines
Ernst & Young	Nokia	Volvo
Facebook	Northwest Airlines	Western Union
Flickr	Novell	Wikipedia
GE	NVIDIA	XING

Many companies have been successfully using global templates for half a decade or more, including Google, IBM, and HP. We have yet to encounter a company that abandoned its global design template in favor of letting each country or region design its own Web site from the ground up.

Localization: The Top 20

Depth of local content and functionality is key to scoring well in this category. Companies like Amazon and PayPal have invested millions of dollars in localizing personalization and ecommerce tools for users in their target markets. And while Amazon may not offer a dozen localized Web sites, the markets that it does target enjoy a depth of content and resources.

Localization: Top 20 Sites

Rank	Company	Score
1	Google	25
2	Wikipedia	25
3	PayPal	25
4	Yahoo!	25
5	Ebay	25
6	MSN	25
7	Amazon	25
8	UPS	24
9	BBC	24
10	Salesforce.com	24
11	Renesas	24
12	Coca-Cola	24
13	CNN	24
14	Cisco Systems	23
15	Volvo	23
16	Caterpillar	23
17	HP	23
18	Last.fm	23
19	Texas Instruments	23
20	Dow Corning	23

Source: Byte Level Research

Wikipedia made it to number two by sheer weight of local content. The site features a significant amount of user-generated, local-language content.

Most Improved Web Sites

As we study the evolution of global Web sites from year to year, we look for those Web sites that have made noticeable improvements – from adding new languages to supporting a new global design template. While many of these Web sites still have plenty of room left for improvement, they are clearly headed in the right direction.

Here are the Web sites that have made significant progress over the past year:

- British Airways
- eBay
- Jaguar
- John Deere
- McAfee
- Mercedes
- Motorola
- NIVEA
- Salesforce.com
- Smart
- Steelcase

Best Web Sites With Fewer Than 10 Languages

Some companies do not yet have their sights set on conquering the globe. Instead, they may be focused on a handful of markets that may only require a handful of languages.

And yet these Web sites may be doing an excellent job of Web globalization. To highlight these special companies, we removed the language metric from our calculation and ranked the top Web sites with fewer than 10 languages (excluding English).
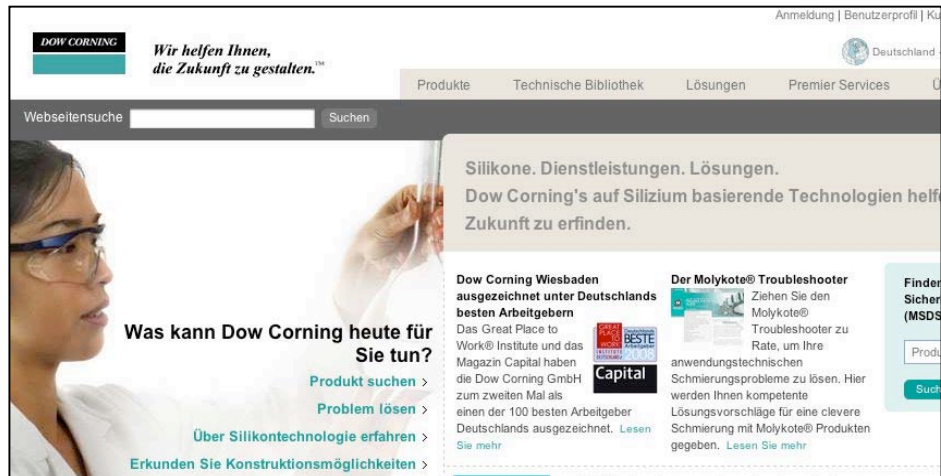
Here are the top 20 Web sites overall:

1. Dow Corning
2. Starwood Hotels
3. Renesas
4. eFax
5. WebEx
6. OCLC
7. Flickr

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8. United Nations

9. Ryanair

10. Marriott

11. Radisson

12. Huawei

13. Nintendo Wii

14. Continental

15. Amazon

16. Hyatt

17. Tiffany

18. Accor Hotels

19. United Airlines

20. National

The Laggards

Rounding out the lower end of our scoring are companies, both large and small, across a range of industries. Here are the 20 sites that scored lowest overall:

- Bearing Point
- Boston Scientific
- Budweiser
- Carnival Cruise Lines
- Disney
- evian
- Facebook
- Fidelity
- Four Seasons
- Goldman Sachs
- Haier
- Heineken
- J. Crew
- Maytag
- McKinsey & Co
- Patagonia
- Pfizer
- Sherwin-Williams
- ST Microelectronics
- Wal-Mart

A number of these sites are long-term residents of this bottom tier, such as Disney, Wal-Mart, McKinsey, and Four Seasons.

BlackBerry and Steelcase were among the lowest-scoring sites in 2007. This year, thanks to significant improvements in their Web sites, both companies escaped the bottom third of all Web site scores.

How They Made It to the Bottom

To end up at the bottom third of the list, a Web site typically had to exhibit the following traits:

1. Absent or poorly executive global navigation
2. Few languages or locales
3. Shallow amounts of localized content
4. Inconsistent designs across localized Web sites

No industry is immune from poorly globalized Web sites

If there is one lesson to be learned from this report, it's that all companies, regardless of industry, must work hard to create successful global Web sites.

PART IV
INDUSTRY PROFILES AND COMPANY INSIGHTS

Best in Class

This exhibit includes the leading global Web sites within each industry category. Even though companies such as DHL and Merck may not have made the overall top 20 list of Web sites, they are leaders within their respective categories.

Industry Leaders

Industry	Leader
Airlines	Emirates
Automotive	Volvo
Business Technology	Cisco Systems
Consumer Goods	3M
Consumer Technology	Philips
Delivery Services	DHL
Fashion/Apparel	NIVEA
Financial Services	American Express
Hotels/Resorts	Starwood Hotels
Industrial/Diversified	Caterpillar
Media/Entertainment	BBC
Medical/Pharma	Merck
Non-profit/Govt.	European Union
Professional Services	Deloitte Touche Tohmatsu
Rental Car	Hertz
Retail/Restaurant	IKEA
Semiconductors	Texas Instruments
Social Networking	XING
Sporting Goods	Adidas
Video Games	Xbox
Web Services	Google

Source: Byte Level Research

On the following pages we focus on each industry, highlighting interesting developments along the way.

Airlines

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Emirates	73	25	21	17	10
British Airways	71	24	16	17	14
Northwest Airlines	69	25	14	15	15
American Airlines	68	25	17	16	10
Ryanair	67	24	17	17	9
Continental	64	25	15	17	7
KLM	61	18	15	13	15
Air France	61	16	15	17	13
United Airlines	60	25	12	15	8

Source: Byte Level Research

Overview

Emirates emerged at the top of the list for the second year, despite losing a few points for a poorly redesigned global gateway. British Airways finished a very close second and, if it improves its global gateway, could take the lead next year. **Every airline Web site added at least one language in 2007**, as illustrated below:

	Languages	
	2007	**2008**
Continental	5	6
American	9	10
KLM	18	20
Air France	10	17
British Air	10	18

In terms of language support, KLM/Northwest Airlines dominates, supporting 21 languages. But Air France and British Airways are quickly gaining on them.

88

Web Site Notes

Overall, the airlines have done a better job over the past year of supporting global design templates, as illustrated below:

Germany

Korea

Emirates redesigned it splash global gateway over the past year, and not for the better. As shown here, in 2007 the gateway displayed all the country Web sites, grouped by region. This approach was simple and made the country site easy to locate.

2007

2008
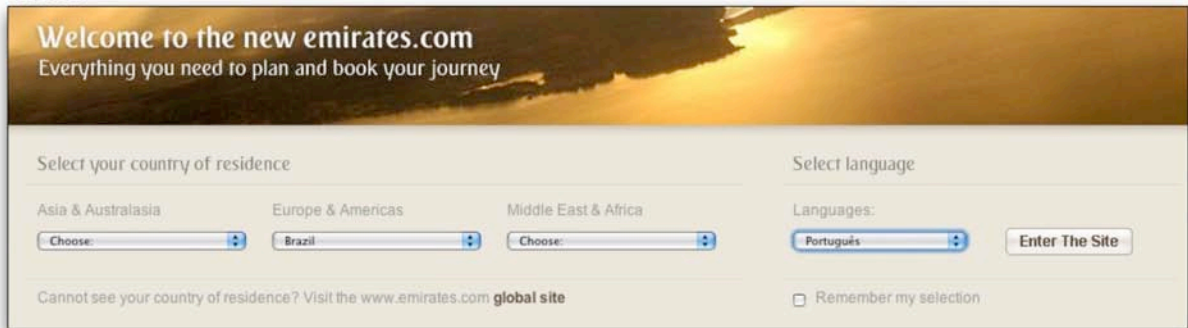
The current splash page opts instead for a series of pull-down menus. For someone who does not speak English, this approach is not as intuitive. Even for native-English speakers, we found this device to be less user friendly than the old gateway.

Although Emirates lost points for its new gateway, none of its competitors offer splash gateway pages that are any better. Airlines generally opt for pull-down menus.

90

In 2006, **Continental Airlines** used a globe icon to call attention to its permanent gateway, shown on the right.

This year, Continental uses flags and an overlay gateway that appears when the user clicks on the link, shown here:

The problem with this device is that it assumes the user already speaks English. A non-native English speaker may struggle to understand the instructions.

A better approach would be to go back to the globe icon and have it link to a global gateway page, or use a global gateway splash page.

91

Air France and **Emirates** host their US Web site at the .us domain. We expect more airlines will join this emerging trend in the years ahead. The Air France splash global gateway, shown here, is hosted at **www.airfrance.com**.

Four Web sites now use a splash global gateway: **Air France, Emirates, British Air**, and **KLM**. In 2006, only British Air and Emirates used splash gateways.

Five US airlines now offer localized Spanish-language Web sites: **Continental, United, American, and KLM/Northwest**. Though not included in this report, **Alaska Airlines** and **Southwest Airlines** also offer Spanish sites for the US market. Four years ago, only Southwest Airlines offered Spanish content for the US market.

92

Automotive

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Volvo	88	25	23	18	22
Mini	81	25	17	18	21
Saab	80	22	20	18	20
Nissan	75	19	18	16	22
Smart	74	25	16	18	15
Jaguar	73	22	16	18	17
BMW	72	22	18	8	24
Mercedes	71	18	18	11	24
Volkswagen	70	16	17	20	17
Hyundai	67	17	16	10	24
Lexus	66	19	19	10	18
Audi	62	20	16	5	21
Cadillac	59	18	15	13	13
Toyota	50	4	19	2	25
Honda	44	0	19	0	25

Source: Byte Level Research

Overview

Volvo has emerged on top for a third year in a row, scoring highly across all four categories.

Honda leads the category with support for 41 languages; unfortunately, Honda also scored at the bottom for both global navigation and global consistency. Saab was the most improved overall, moving from 9th place last year to 3rd place this year.

More than half of the Web sites in this category added languages over the past year. Jaguar added the most languages over the past year, improving from 15 to 24 languages.

Web Site Notes

Volvo demonstrates a number of best practices – from global navigation to global consistency. But there is one element of consistency that is truly impressive.

Volvo Cars and Volvo Group are two separate entities and yet a visitor to **www.volvo.com** would probably not realize this. As shown here, the landing page presents all Volvo brand properties in a consistent fashion.
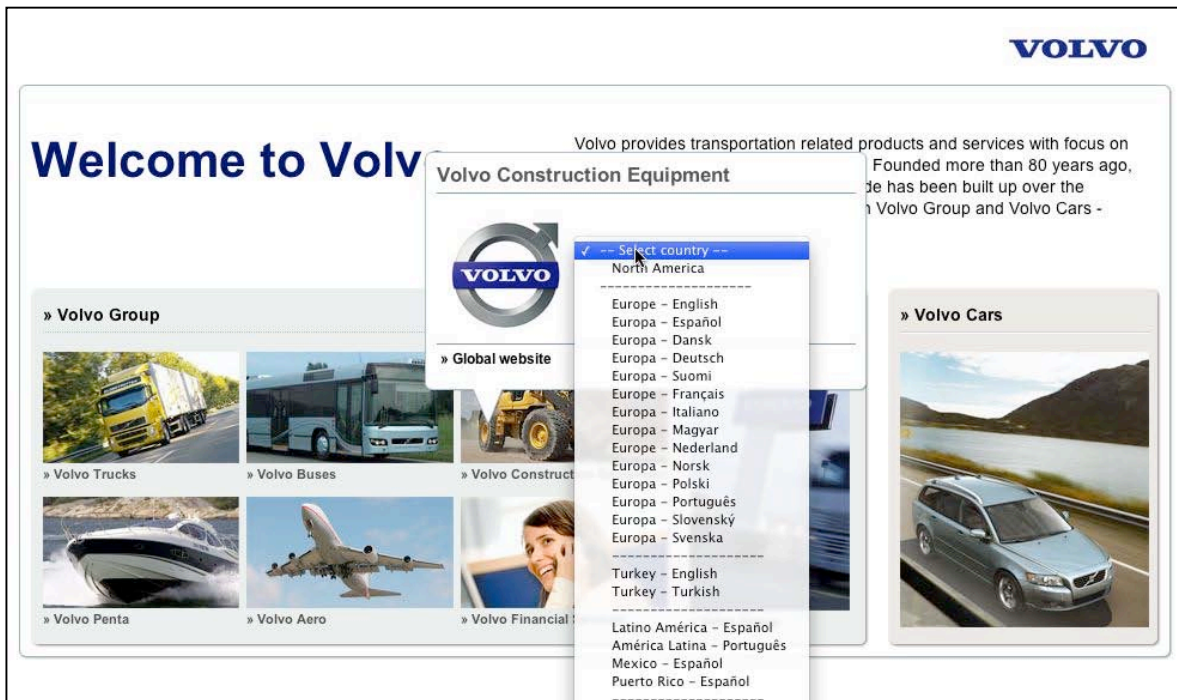
This landing page is quite new and illustrates the delicate balancing act that many global corporations face when managing disparate product and brand Web sites.

What's interesting about the gateway is that each group site, when selected, presents a pop-up gateway.

94

Volvo exhibits excellent global consistency between the various product sites, as shown here:

This level of brand consistency is very difficult for companies to achieve, as it requires coordination across product and brand lines.

95

Even the Volvo Cars Web site (Mexico shown below), while not part of the Volvo Group, shares the same Volvo "feel" in design sensibility and overall color scheme. Notice how the Volvo logo occupies the same position as it does on the Volvo Trucks site.
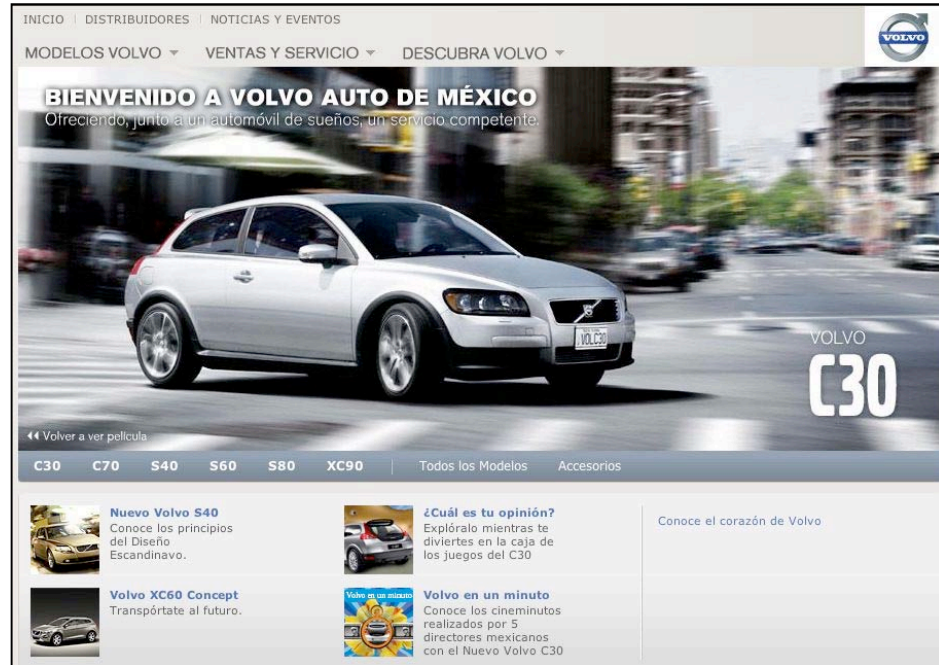
Navigation could still be improved on both Volvo Cars and Group sites. While both sites do an excellent job with landing pages, once the Web users are inside a specific site, global navigation is still a bit consistent overall in placement and functionality. Shown here, the gateway is positioned in the lower right corner of the Web page.

96
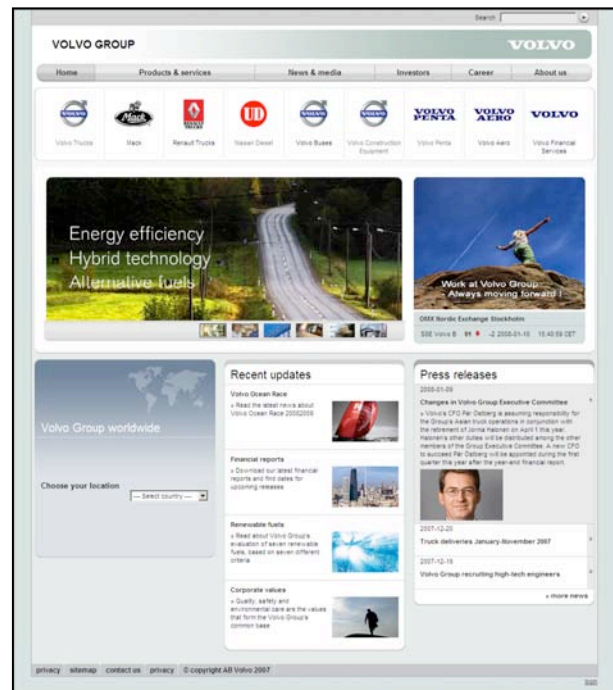
More than half of the automotive Web sites now use a splash global gateway: **Volvo, Mercedes, Hyundai, Saab, BMW, Jaguar, Mini,** and **Smart**.

Smart made good improvements to both its global consistency and global navigation. Its splash global gateway is shown here:

Mini does not provide a link back to its splash landing page on any of the country sites, which can be frustrating to users who need to switch. **Smart** also does not provide a link back to its global gateway.

Toyota, **Nissan**, **Hyundai**, **Lexus**, and **Honda** offer Spanish content for the US market. **Toyota** also offers a Chinese site for the US market.

97

The success of a splash global gateway depends on execution. As shown below, the **Mercedes** splash page was not very usable for the non-English speaker. For starters, Mercedes offers a choice between vehicle Web sites and a "brand" site, which we found confusing.
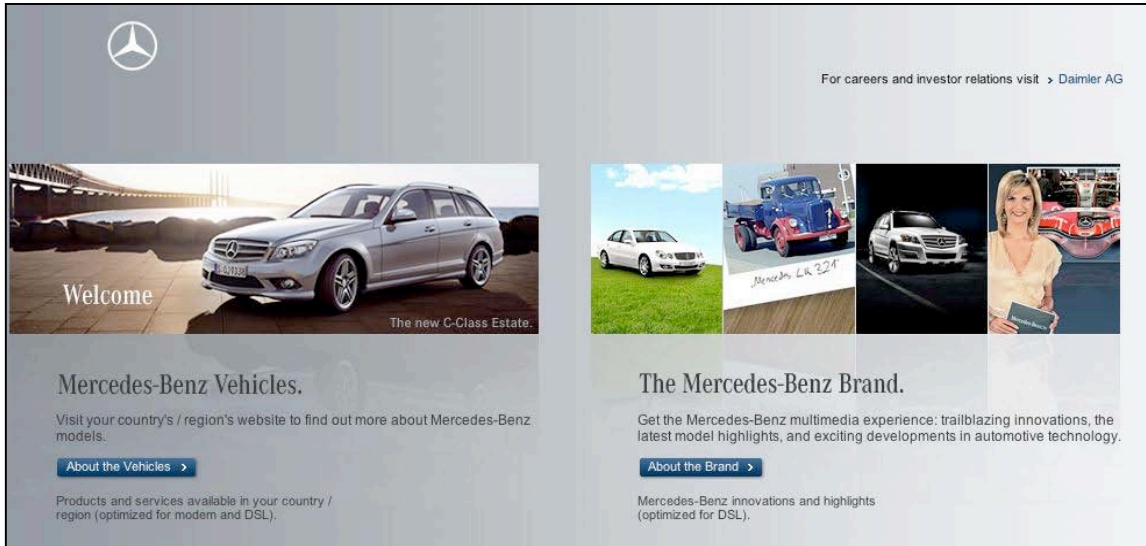
Users who selected the country pull-down menu were forced to select not just a country but a particular vehicle model before being taken to that country site. This too did not make sense, as one cannot assume that Web users already know what vehicle they are interested in before arriving at the Web site.

98
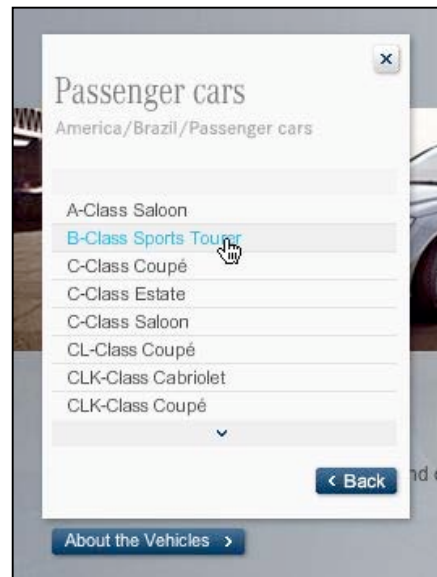
BMW also uses an over-designed splash gateway, shown here. Users face selecting between German and English, as well as two pull-down menus.

99
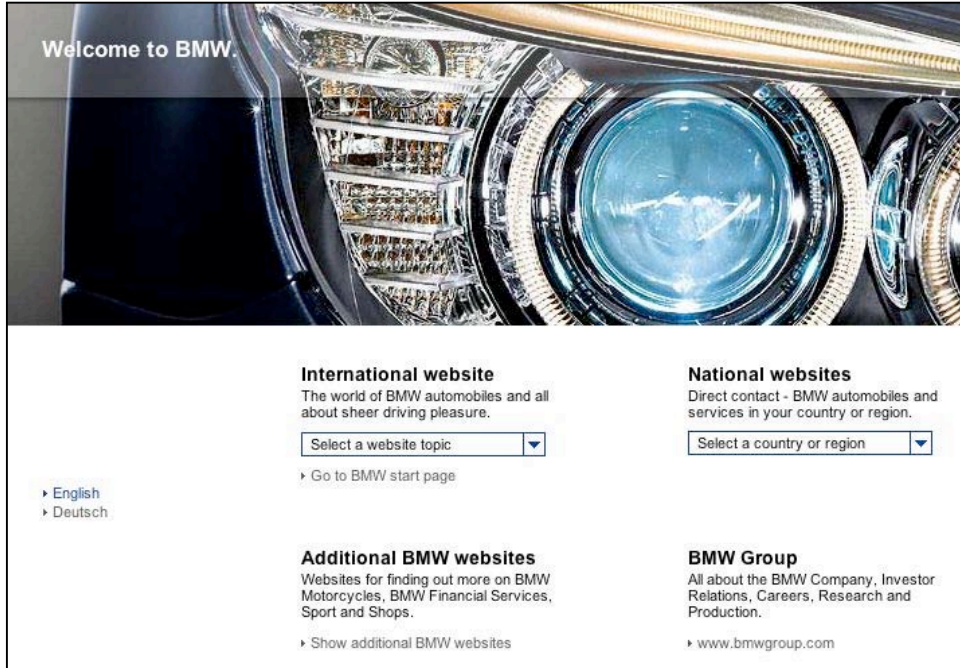
Business Technology

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Cisco Systems	92	25	23	20	24
IBM	83	25	21	15	22
Seagate	82	25	22	23	12
Sun	79	25	20	15	19
Oracle	78	25	15	17	21
Autodesk	78	25	20	18	15
Avaya	74	25	18	16	15
SAS	72	25	16	14	17
3Com	69	19	17	19	14
Business Objects	68	23	16	18	11
SAP	67	25	10	12	20
BMC Software	67	25	14	15	13
EMC	66	25	13	12	16
Xerox	65	20	15	11	19
Huawei	64	25	13	17	9
Novell	62	25	17	5	15
NEC	58	21	14	10	13
Software AG	56	18	12	12	14

Source: Byte Level Research

Overview

Cisco Systems emerged on the top of this category for the third straight year. Last year, Cisco added support for Ukrainian, raising its language total to 38 – the most of any company in this category. Cisco's one major weak spot is navigation, which we believe will change for the better later in 2008. IBM added one language last year – Serbian – improving its language score slightly. Seagate, thanks to a major redesign over the past 18 months, continues to do well overall.

The companies in this category have largely embraced global consistency – with more than two-thirds earning a perfect score.

In terms of localization, companies in this category tend to be forward-looking. For example, companies such Cisco, Sun, and Oracle have demonstrated a growing support for multilingual blogs.

100

Web Site Notes

Cisco expanded upon its mobile platform, now supporting four language versions of Cisco.com optimized for handheld devices, with more in the works for 2008. Here are three sites:
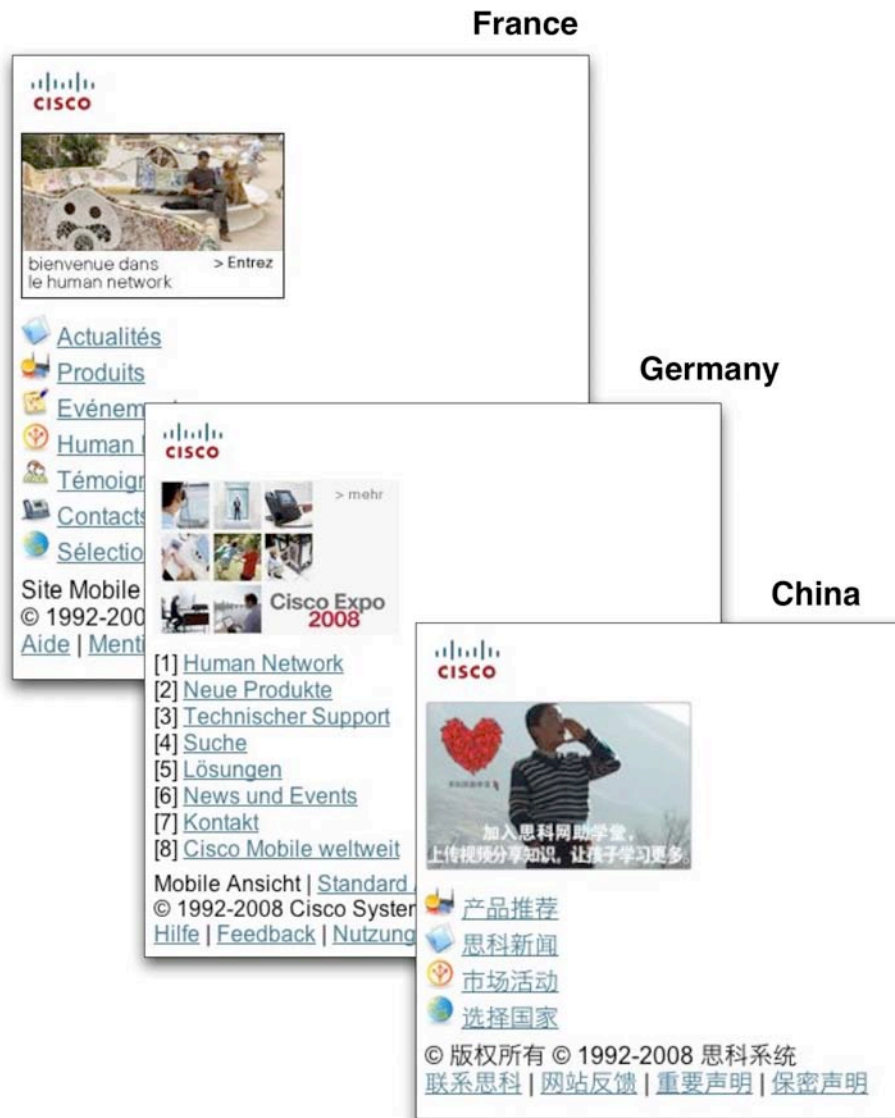
You can see the German site at
www.cisco.com/web/mobile/global/de.

Cisco was one of the first large American companies to begin hosting RSS feeds in languages other than English. RSS feeds now are supported in Simplified Chinese, French, Russian, and German. Podcasts are offered in French, Chinese, and German.

Video content is a growing part of Cisco's Web precense in China Shown here is the China video center:

Last year, none of the Web sites in this category used a splash global gateway. This year, **EMC** becomes the first to do so, shown here:

When users make a country selection, this preference is saved as a cookie so users bypass this page on return visits. At the top of every country page, the user has the ability to reset preferences, as shown here:

103

Xerox redesigned its Web site over the past year and, from a Web globalization perspective, not for the better. In 2007, Xerox used a simple gateway page that listed all country sites. In 2008, this page was replaced with a pop-up window that we found cumbersome to use.
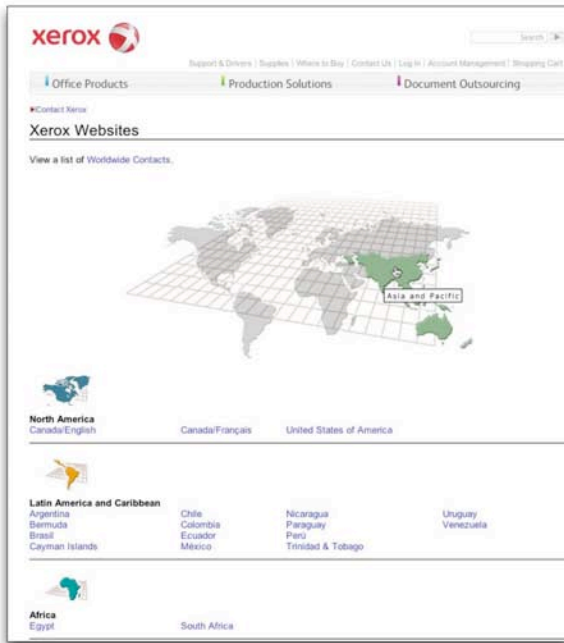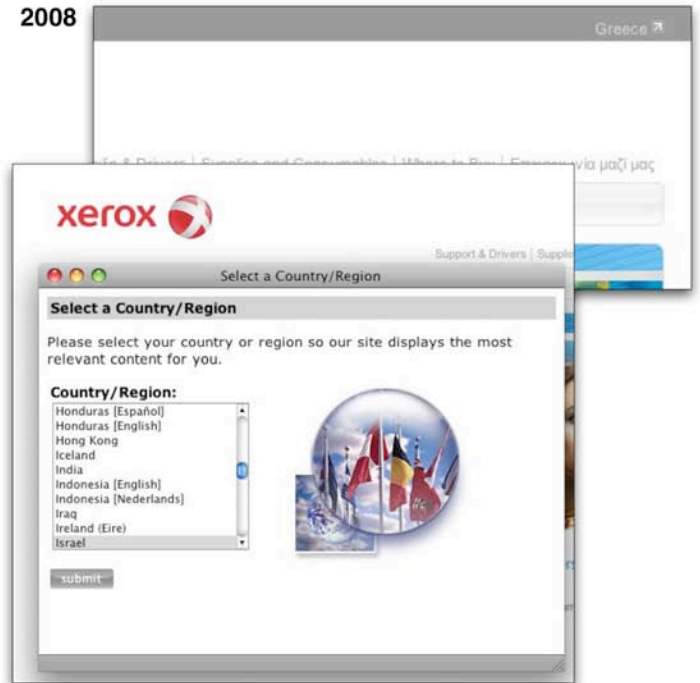
We also noticed that the link to the German Web site was not included in the pop-up menu, a major oversight. In addition, the menu was not consistent in how it presented the languages supported for each country.

104

The **Xerox** site for Greece, shown below, illustrates the importance of avoiding images that have embedded text. The main visual on this page includes English text while much of the rest of the page features text translated into Greek. Embedded text can often be difficult to translate because it generally requires having access to the source files, such as Photoshop, as well as people skilled in using the software.

IBM, with its added support for Serbian, brought its language total to 34. IBM was one of the first business technology companies to embrace the global design template, and years later, still does an excellent job of supporting global consistency.

Seagate has done an excellent job of increasing its language support over the past two years – currently supporting 14, with more on the way in 2008. The company is also focused on filling out the content of many localized sites, such as with Korean, Japanese, and several European languages.

Consumer Goods

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
3M	83	21	20	20	22
Procter & Gamble	80	22	20	17	21
Colgate	78	22	19	19	18
Black & Decker	77	20	21	19	17
Avon	69	19	19	9	22
Coca-Cola	66	5	24	15	22
Unilever	64	20	18	8	18
Iams	64	15	19	15	15
Amway	62	20	20	2	20
Purina	62	13	18	13	18
Whirlpool	60	16	18	10	16
Nestlé	45	3	18	2	22
KitchenAid	43	14	12	8	9
Heineken	42	7	15	5	15
evian	40	9	18	7	6
Haier	35	2	15	9	9
Budweiser	30	5	16	0	9
Maytag	28	7	15	2	4

Source: Byte Level Research

Overview

3M won this category for the second year in a row. Although 3M made few changes to its global site other than adding localized content, none of its closest competitors made significant improvements either.

Avon and Coca-Cola took the lead in languages this year with 35, compared to 3M and Nestlé, both with 34.

Web Site Notes

Companies that use splash global gateway pages include: **3M, Haier, Iams, Coca-Cola**, and **evian**.

The **Iams** gateway is shown below:
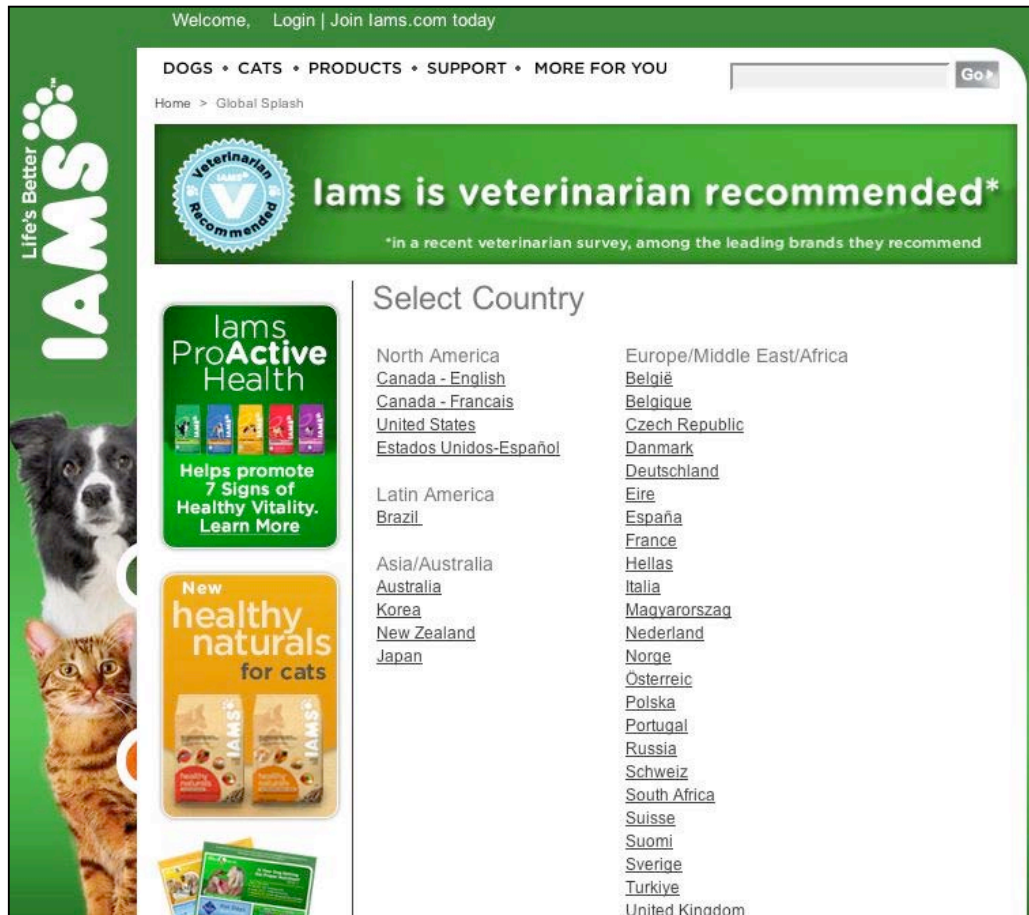
None of the Web sites in this category use geolocation or language negotiation.

Black & Decker improved its global gateway over the past year, as illustrated below:

Amway was very busy over the past year, adding 10 languages, the largest increase for any company in this category.

Nestlé added six languages, followed by **Coca-Cola**, with four new languages: Bulgarian, Estonian, Ukrainian, and Serbian.

109

Purina's global gateway, while nicely executed overall, includes one very awkward typo (see Israel):
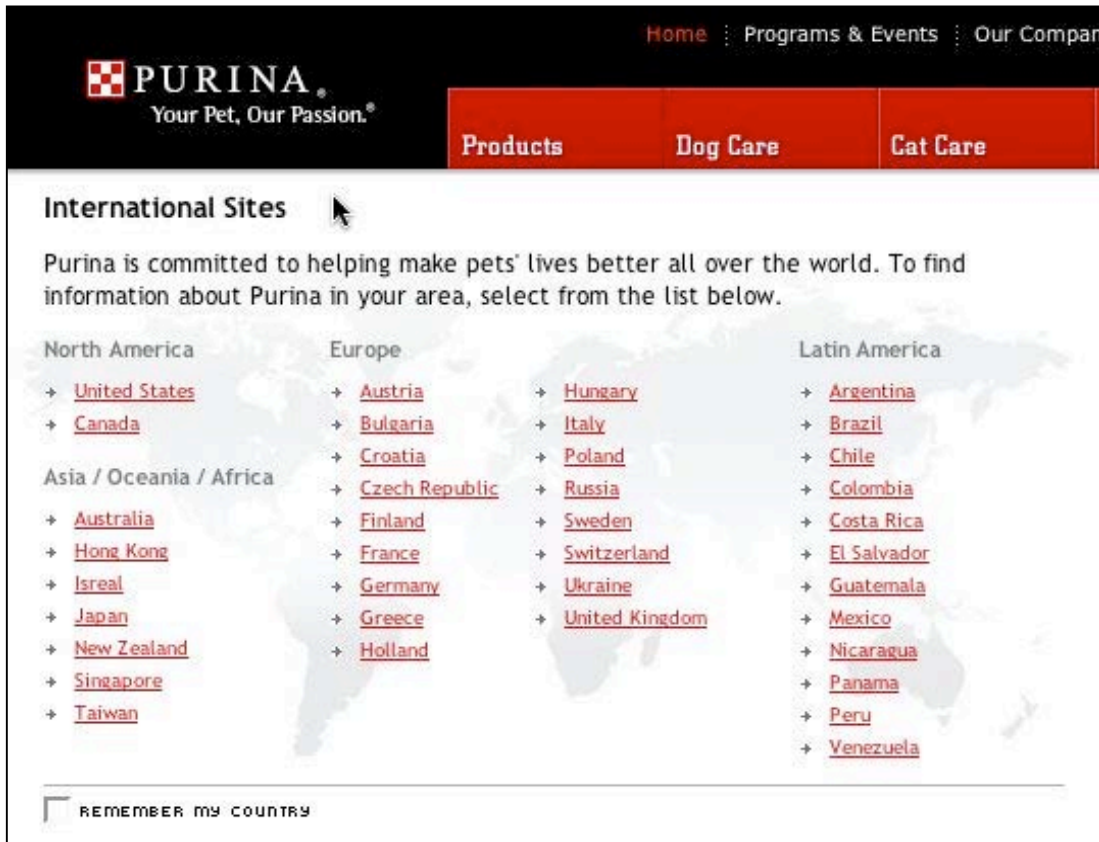
The most popular language added by companies in this category was Slovakian, with five companies adding it over the past year: **Black & Decker, Unilever, Amway, Whirlpool**, and **Heineken**.

Both **Nestlé** and **Amway** added Spanish-language support for the US market, joining **Colgate**, **Coca-Cola**, and **Iams**.

110

The **Budweiser.com** site, like most beer sites, requires Web users to enter their date of birth before they may select a country or language. However, if users must be redirected to country sites, they will again be faced with a language gateway, forcing them to input the same information twice. The Italian language gateway is shown below:

Chinese manufacturer **Haier** now uses a map-oriented global gateway, an improvement over last year.

111
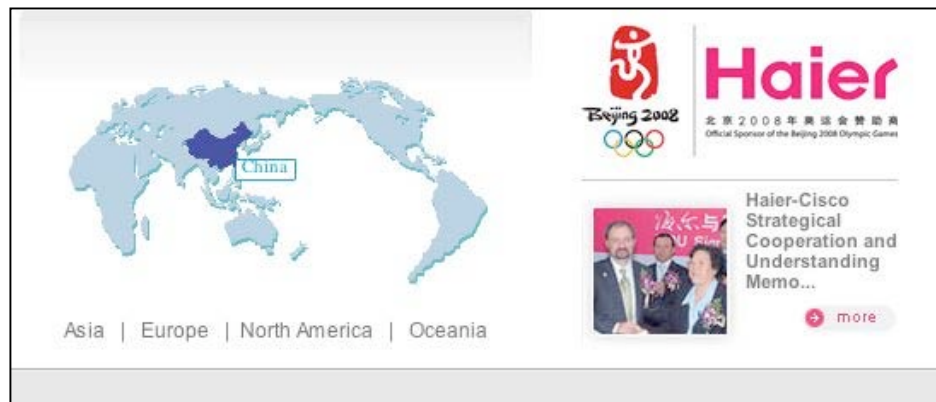
Consumer Technology

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Philips	88	25	21	23	19
Microsoft	86	24	21	16	25
HP	86	24	23	17	22
Nokia	84	25	18	18	23
Adobe	84	25	21	18	20
Lenovo	84	25	19	22	18
Panasonic	83	21	21	19	22
Symantec	80	25	17	22	16
Motorola	79	24	20	16	19
Kodak	79	23	18	21	17
Dell	78	24	20	15	19
McAfee	77	25	15	23	14
Canon	75	17	19	19	20
Palm	74	25	17	22	10
LG	73	21	18	15	19
Samsung	72	20	16	15	21
Toshiba	66	20	16	11	19
Apple	66	25	17	10	14
Wacom	65	20	15	19	11
Bose	64	22	18	13	11
Creative	63	23	17	8	15
Yamaha	59	13	16	14	16
Sony	58	12	17	5	24
BlackBerry (RIM)	58	18	11	20	9
Nikon	52	12	17	8	15

Source: Byte Level Research

Overview

This category includes a mix of software, hardware, and consumer electronics manufacturers. And while most of these companies also serve business customers, our focus for the purpose of analysis was on how well these sites serve consumers around the world.

Philips leads this category largely because it offers better global navigation than its two closest competitors: Microsoft and HP, which tied for second place. Microsoft leads this category in number of languages supported – with 41.

Web Site Notes

Most companies in this category added languages over the past year – with **Adobe** and **Symantec** adding more than 10 languages each.

Adobe now supports 31 languages and has been innovative in its support for language-specific blogs. The screen shot below is from Adobe's blog aggregator, which allows users to select blog content according to language:
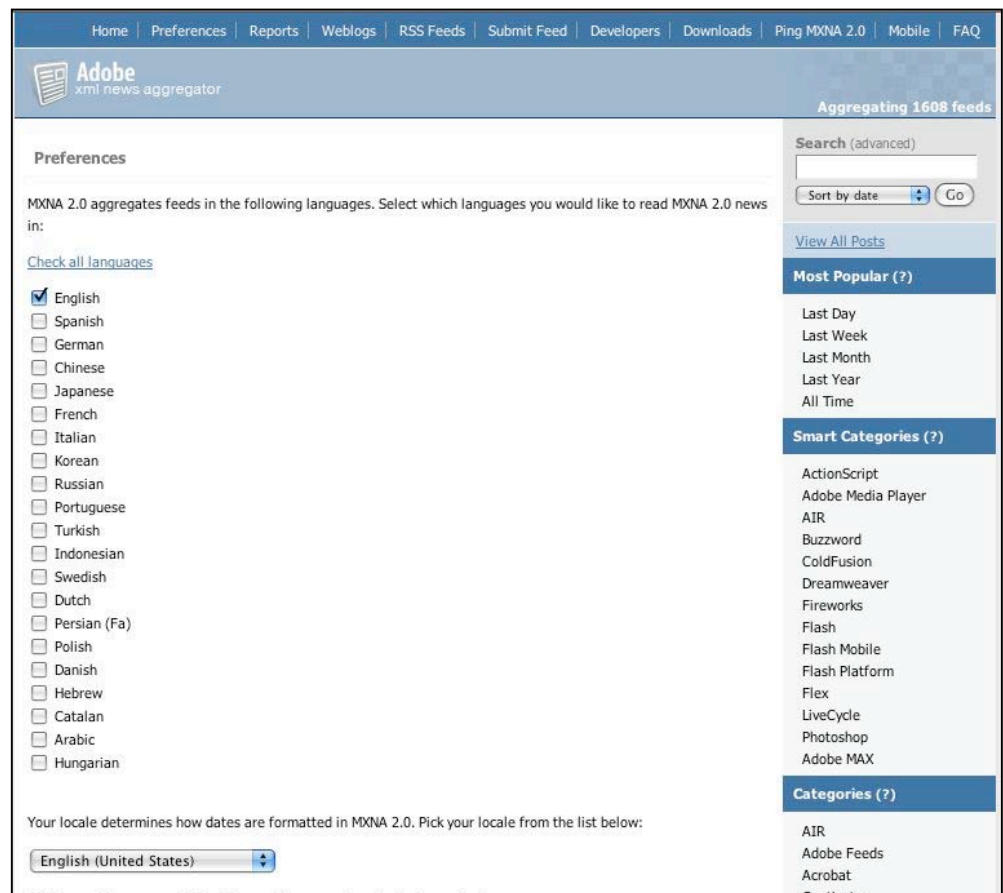
Adobe has also begun using asterisks to let users know when they are clicking on links that will take them to English content, shown here:

Adobe Spain

Adobe uses an asterisk to denote links that will take users back to English content, as shown in the header above.

The asterisk is explained at the bottom of the Web page, shown here:

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BlackBerry last year greeted users with a splash page that included no language links. Users were required to select "individuals" or "business" sections before getting to the language selector.
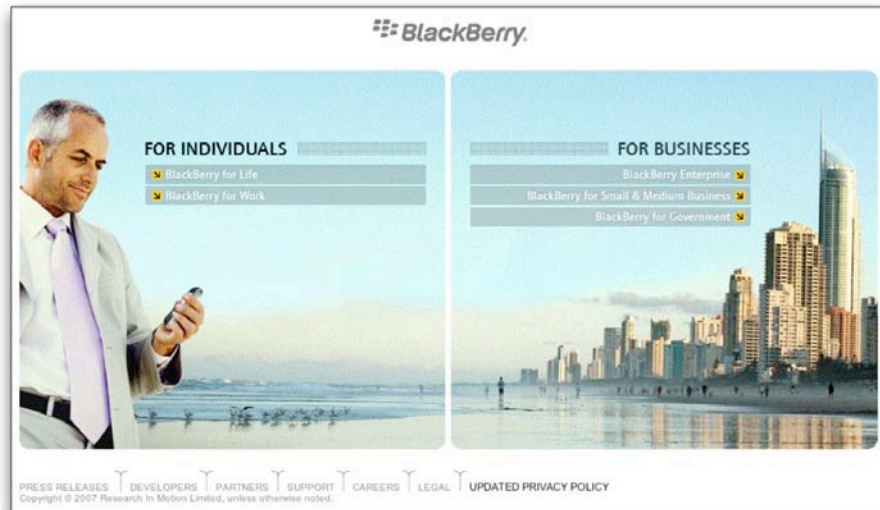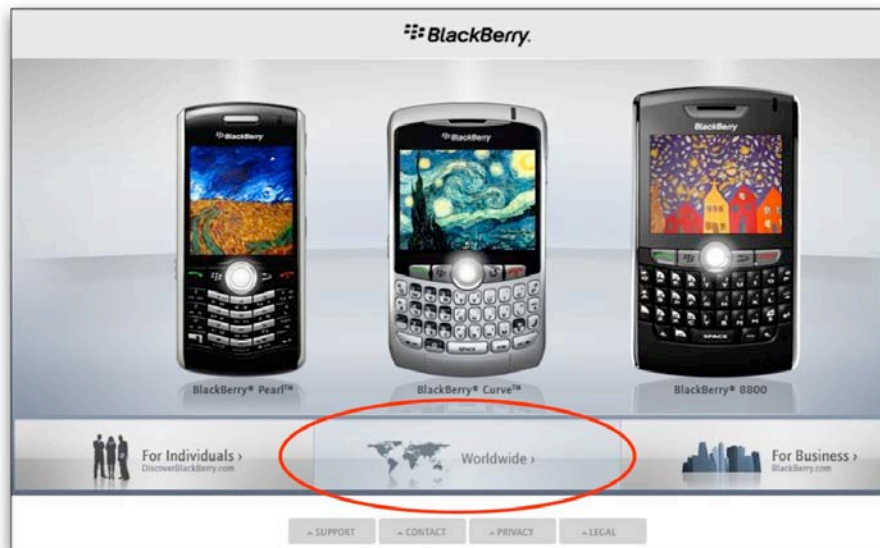
Fortunately, BlackBerry has since abandoned that approach and made its global gateway prominent.

Sony now uses geolocation – one of three companies in this category to do so. The screen shot below shows our Firefox browser using a proxy based in the Netherlands. Notice how the URL **www.sony.com** brings us to a landing page that asks us if we want the Netherlands Web site or the Sony.com site.
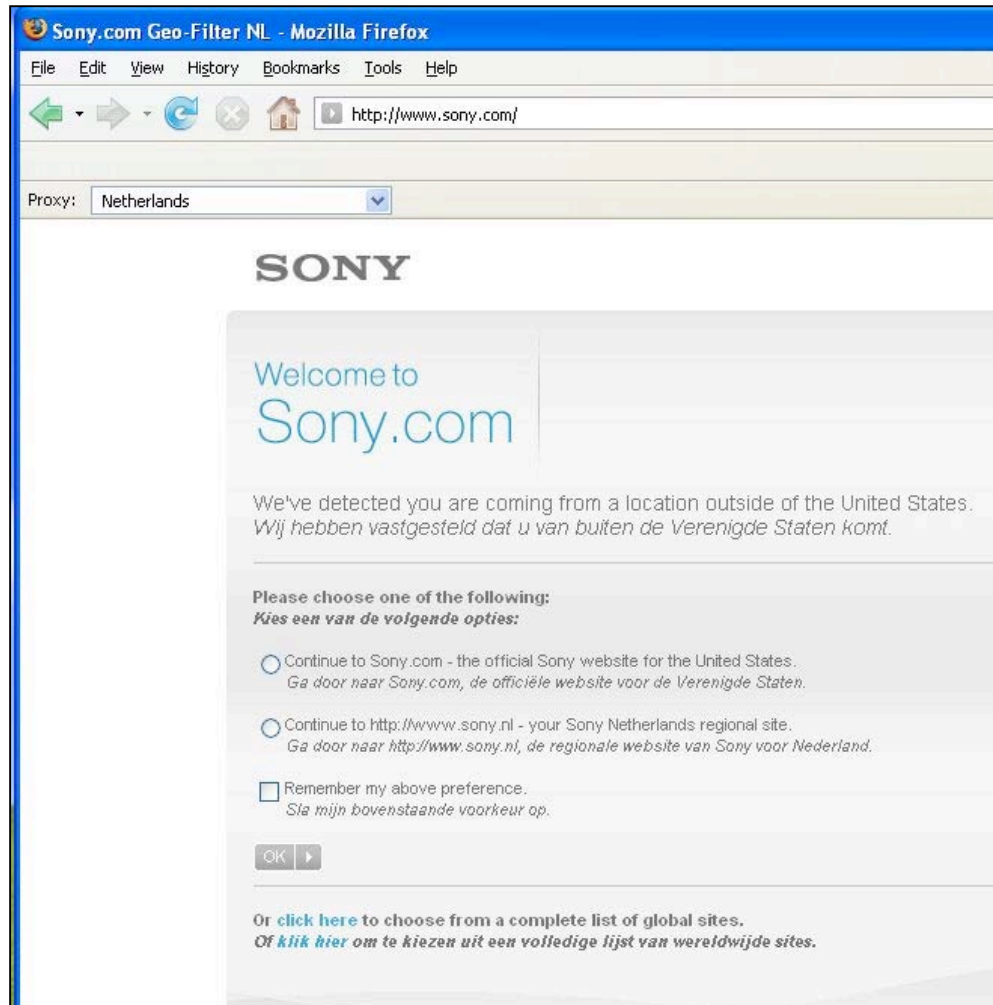
What's interesting is that Sony effectively equates the **.com** address with the United States Web site. We believe that this approach is inherently flawed and that Web sites from companies such as Volvo and IBM (in which **.us** is used for US sites) represent the way of the future.

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Bose and **Creative** also make use of geolocation.

Panasonic added language support for Indonesian over the past year, as well as a site for Chile. It has also continued to expand the use of its global design template to country sites, including Singapore, Thailand, Malaysia, Indonesia, and India.

The Panasonic.com page now includes a global gateway link along with a globe icon – a big improvement from early 2007.
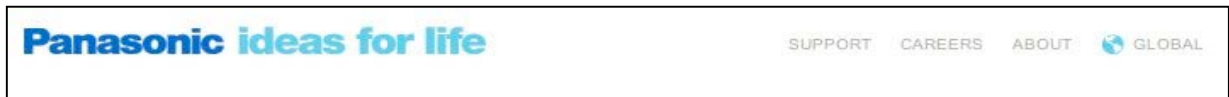
Motorola added support for Vietnamese. New and revised country sites include Austria, China, Japan, Russia, and Switzerland. Motorola also made good progress on improving global consistency across its country Web sites.

In 2007, **Kodak** was the only Web site in this category to use language negotiation. This year, McAfee also makes use of language negotiation.

Apple has begun using a globe icon to improve navigation, though it is not used on the main Apple site. The icon, shown here, is used in the customer support section to help Web users navigate between languages.
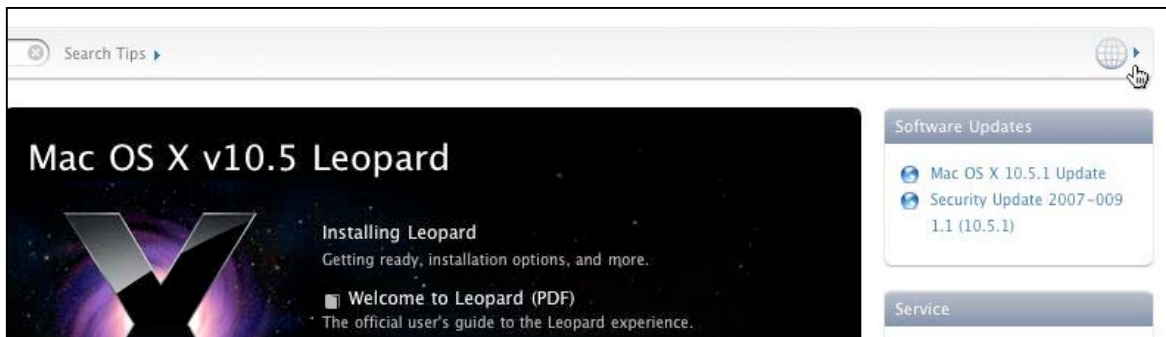
Sony demonstrates little in the way of global consistency. In contrast, **Nokia** exhibits excellent global consistency.

Taiwan

Germany
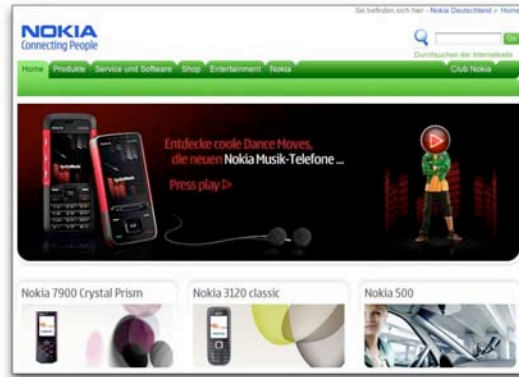
Samsung uses bandwidth-intensive audio-visual files even for markets that don't have a high proportion of broadband users, such as Brazil, shown here.

118
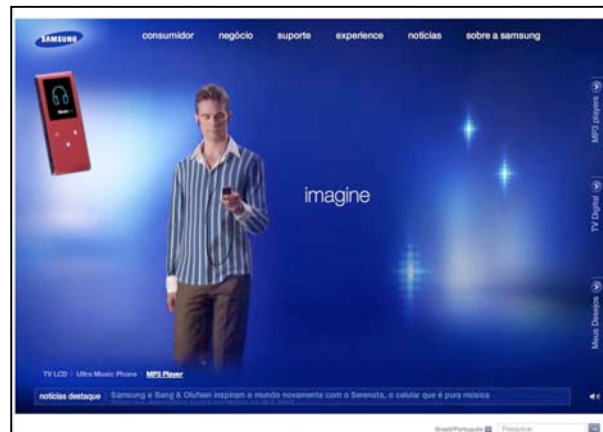
The **HP** site is globally consistent and offers an impressive depth of localized content. But its weak spot continues to be global navigation.

The site relies on a pull-down menu in which country and language names are not in the local language. In addition, the countries are sorted in a way that is not user-friendly.

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The strongest aspect of the **Microsoft** Web site continues to be its
the breadth of languages supported. Microsoft added support for
Indonesian over the past year. Like HP, global navigation continues
to be Microsoft's weakness. Ironically, the Xbox Web site does very
well in terms of navigation and makes use of language negotiation.
And the Microsoft Live search engine makes good use of language
negotiation. Unfortunately, Microsoft.com does not use language
negotiation or geolocation, and its global gateway is challenging to
use:

120
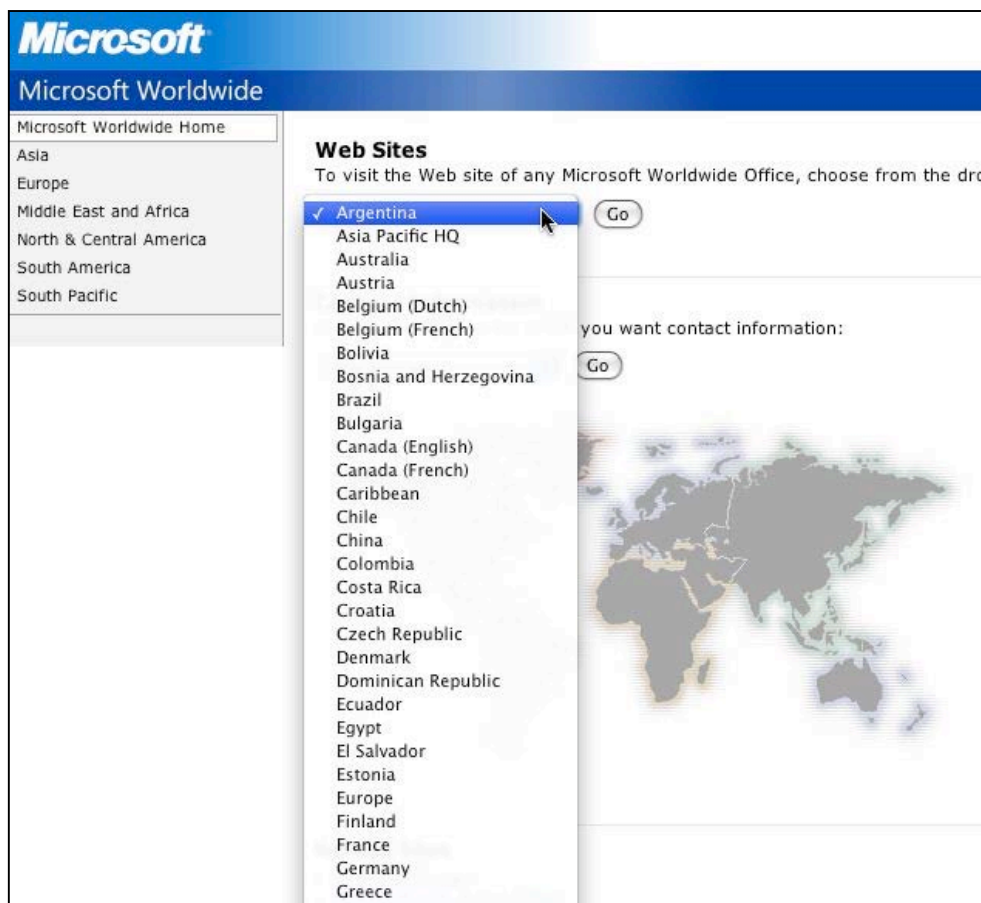
Lenovo added three more languages last year: Danish, Greek, and Hungarian. The site has grown from 18 to 26 languages in just two years. Its global gateway, shown below, has similarly evolved over the years to support these added languages:
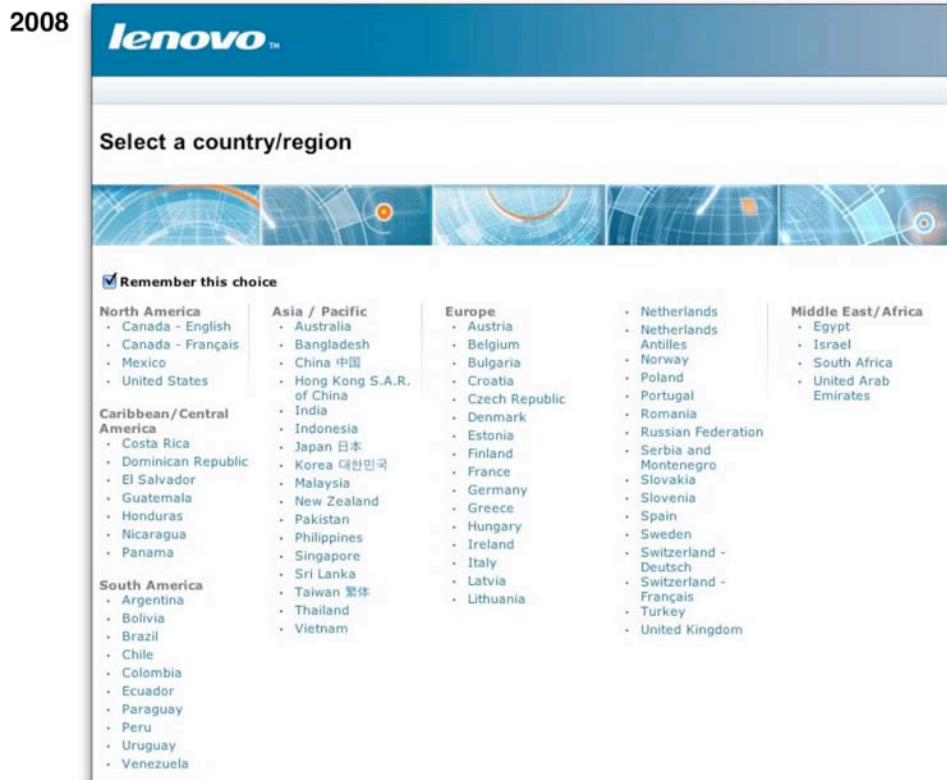
Delivery Services

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
UPS	80	24	24	14	18
DHL	79	24	19	12	24
TNT	77	23	18	14	22
FedEx	75	24	18	17	16

Source: Byte Level Research

Overview

Although the companies in this category are among the most global companies in the world, their Web sites still leave much room for improvement. Fortunately, we saw encouraging signs over the past year.

UPS went from 13 languages in 2007 to 26 languages today – helping the company take over the lead in this category from DHL.

DHL still leads in languages, with 39, followed by TNT, with 34. FedEx and TNT also added languages over the past year.

The one glaring weak spot of all four sites is global navigation. For companies that serve so many countries, we find it odd that none of them currently make use of either geolocation or language negotiation.

Web Site Notes

Both **UPS** and **FedEx** added support for Turkish over the past year.

DHL allows users across all locales to view the site in the local language or in English. Providing English as an alternative language in all markets is a smart approach, particularly since many DHL customers may be English-speakers in other countries. However, the language selector can be difficult to find in the middle right-side of the Web page.

FedEx Portugal, shown below, mixes an English-language promotional element in the middle of the translated site. Ideally, promotional elements should also be localized for the market.

Although **FedEx**, **DHL**, and **UPS** all use splash global gateways, the gateways rely on excruciatingly long pull-down menus. These companies would benefit tremendously by using geolocation to improve the user experience.

We recommend that all four Web sites begin testing geolocation and language negotiation to save Web users from having to click through landing pages and pull-down menus, such as the one shown here.
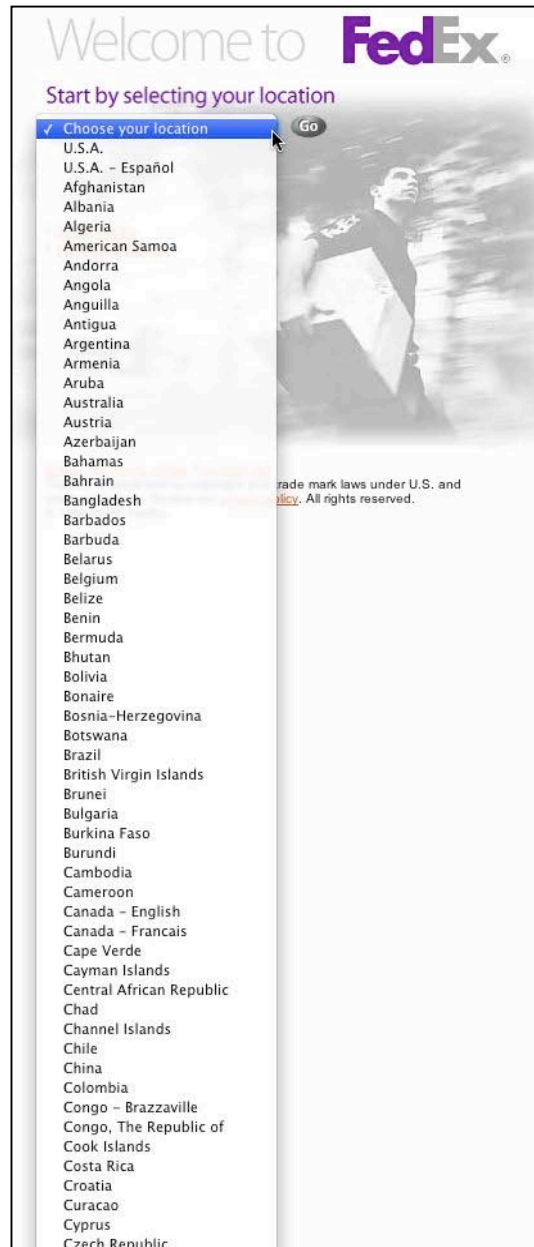
Fashion/Apparel

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
NIVEA	83	25	16	22	20
Crocs	58	20	12	16	10
Loréal	57	18	18	7	14
Chanel	57	16	15	16	10
Cartier	55	18	12	15	10
Polo	55	17	18	11	9
Lancôme	50	15	20	2	13
Estée Lauder	49	14	16	12	7
Tommy Hilfiger	49	14	13	16	6
Louis Vuitton	46	15	15	9	7
Levi's	43	2	19	11	11

Source: Byte Level Research

Overview

NIVEA finished number one for the second year in a row and increased its lead over the competition. The reason for this is NIVEA's adoption of an improved global gateway and an increase in the number of languages supported – to 30.

This is the first year we reviewed Crocs, and it finished strong, with a fairly consistent design across its localized sites and support for 10 languages.

While splash global gateway pages are becoming a common sight across all industries, ironically, several fashion sites that once used them now no longer do so. We suspect that this has less to do with the efficacy of the gateway and more to do with the ever-changing nature of the fashion industry.

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Web Site Notes

Lancôme used a splash global gateway in 2007, shown below, but has since abandoned it. This is a shame, as there is no way for the Web user to find a country Web site short of inputting the URL directly, such as **www.lancome.fr**.
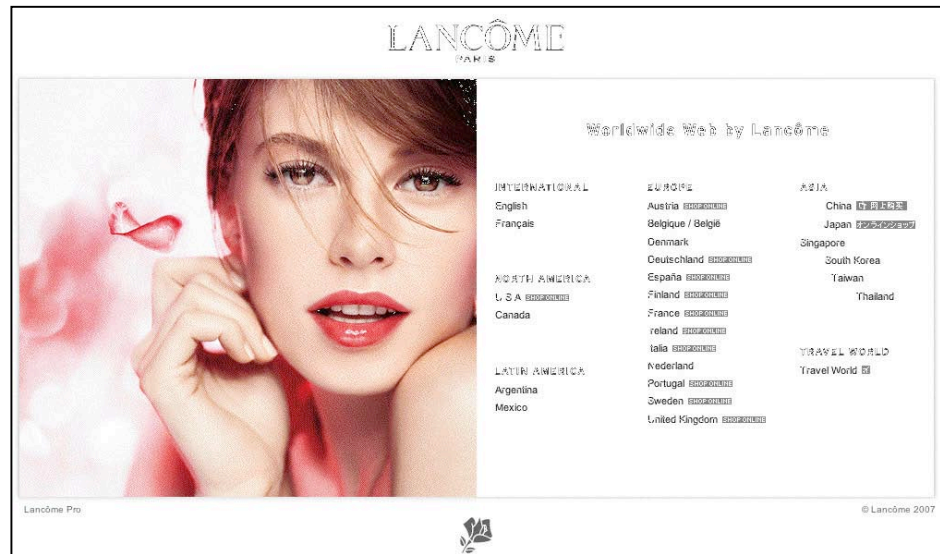
Lancôme was not alone in abandoning the splash gateway. **Polo.com** and **Levi's** are also no longer using splash gateways.

However, Levi's does do a good job of making its global gateway easy to find. In addition, **Levi's** is the only fashion Web site to use language negotiation.

The sites that continue to use splash gateway pages are: NIVEA, Loréal, Chanel, Cartier, and Louis Vuitton.

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Both **Cartier** and **Chanel** prove that a splash global gateway can be both functional and elegant.
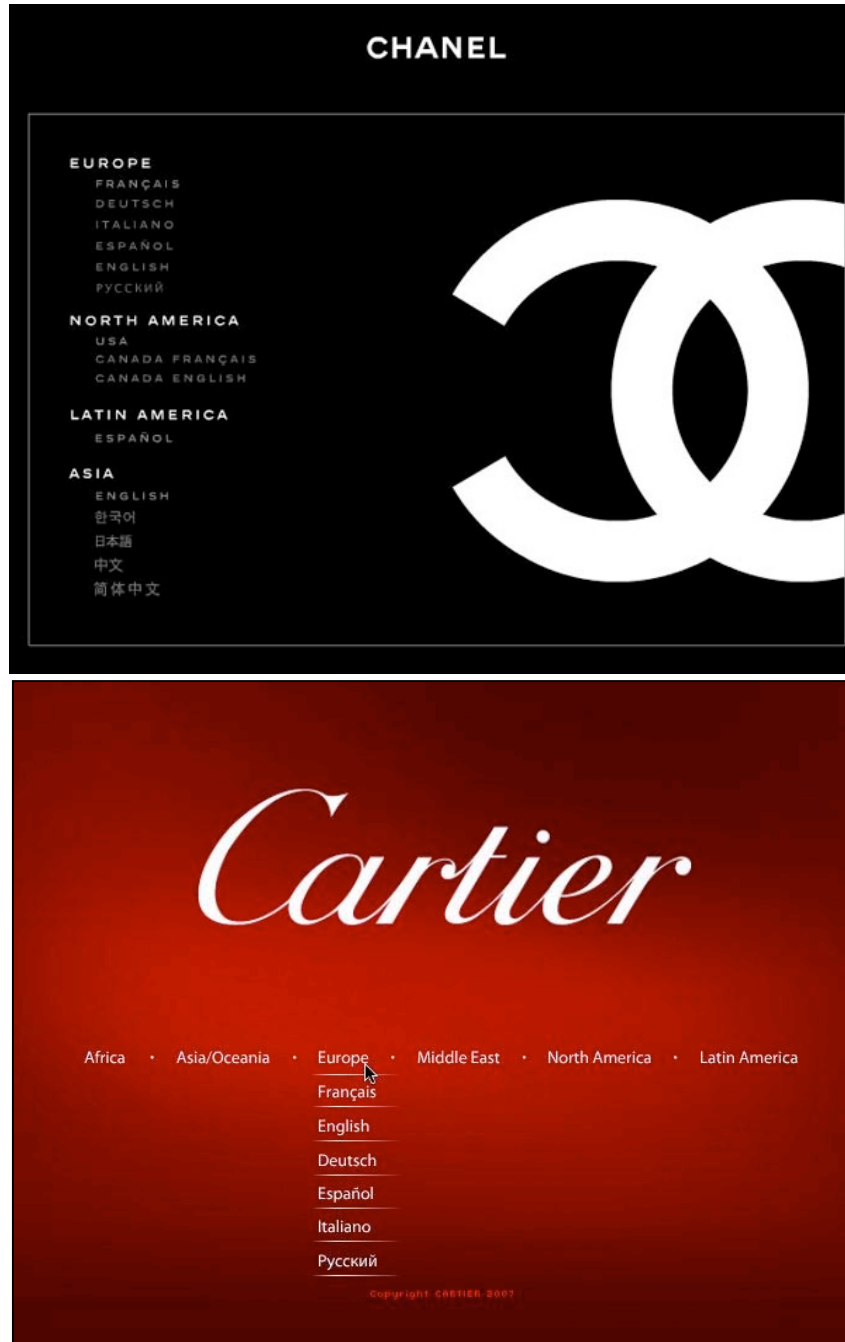
Financial Services

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
American Express	84	21	22	20	21
Citibank	78	21	22	17	18
E*TRADE	70	21	21	16	12
CSFB	67	20	17	19	11
Western Union	63	25	12	15	11
ING	60	21	17	7	15
HSBC	57	17	18	13	9
Chubb	54	15	15	14	10
Morgan Stanley	46	19	9	16	2
Prudential	45	18	14	2	11
Fidelity	41	7	16	9	9
Goldman Sachs	38	21	5	9	3

Source: Byte Level Research

Overview

American Express extends its leadership in the financial services category for a fourth year in a row. The company's support for 32 languages – the most of any Web site in this category – sets this Web site apart. And American Express is not resting easy; it added support for Serbian and Indonesian over the past year.

Meanwhile, Citibank gained ground by implementing a more consistent global design and by improving its global navigation.

Most other sites in this category were relatively static over the past year. Only E*TRADE, ING, Chubb, and Western Union added languages.

Web Site Notes

Citibank launched a new global gateway, shown here. The location of the gateway, at the bottom of the left column, is not ideal though it does function well. As shown below, the gateway expands to allow the user to select his or her language, if it's available.

CSFB is the only financial services Web site to use either a splash global gateway or language negotiation.

E*TRADE is the only financial services site studied that supports Arabic.

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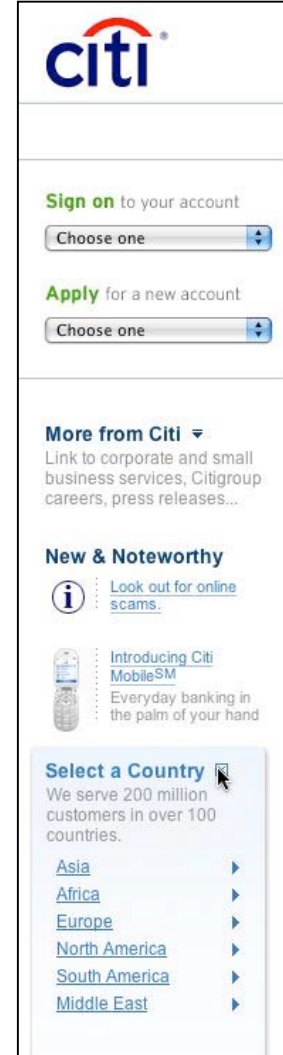
Goldman Sachs uses "business card" sites for a number of markets. Here is Taiwan:
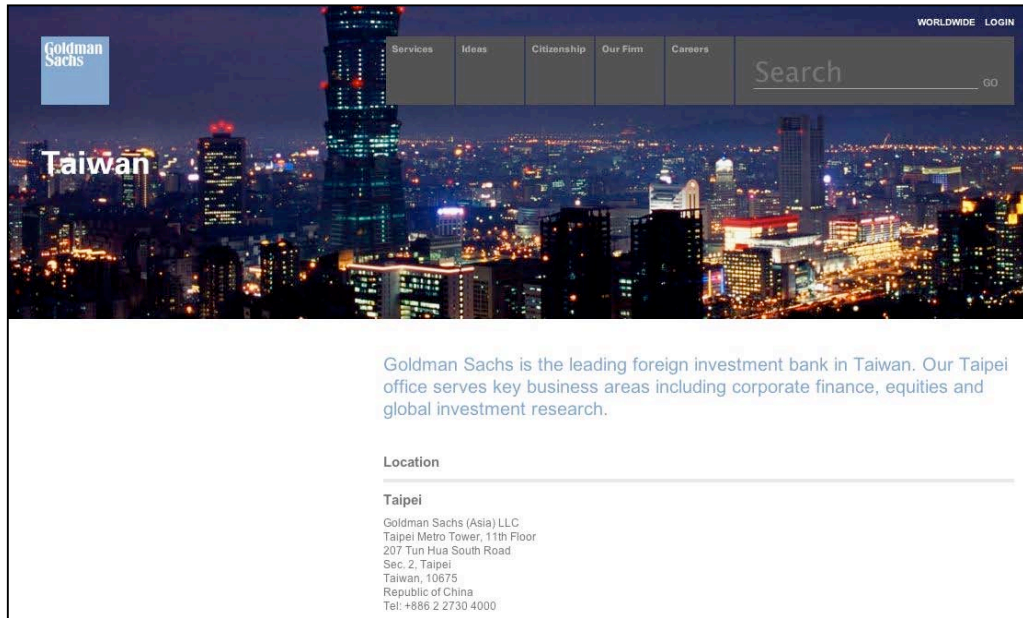
Notice how Goldman Sachs places the contact information prominently in the middle of the page. While a localized site with a depth of content is preferable, the business card approach can be an effective first step.

E*TRADE and **Western Union** do a very good job of using globe icons to highlight the global gateway. We strongly recommend the use of such icons to improve global usability.

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Hotels/Resorts

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Starwood Hotels	76	24	23	22	7
Best Western	71	24	21	11	15
Marriott	66	24	21	13	8
InterContinental Hotels	65	19	17	18	11
Radisson	64	23	15	17	9
Hyatt	61	24	14	17	6
Accor Hotels	60	17	18	14	11
Sol Melia	59	20	18	10	11
Hilton	48	20	11	12	5
Carnival Cruise Lines	41	19	11	4	7
Four Seasons	37	19	4	5	9

Source: Byte Level Research

Overview

This is the second year in a row that Starwood Hotels has been ranked number one in its industry category. Although Starwood does not lead in the number of languages it supports, it does lead in global navigation, and it does a great job with global consistency. Best Western leads in languages – with 19 – but does not offer effective global navigation.

The hotel industry is rather unique in the practice of Web globalization because it generally takes a language-oriented approach to localizing Web sites. That is, the "select country" global gateway is more likely to say "select language."

This is because the audience tends to use the Web sites based on where they want to stay rather than where they live. So the notion of being on your own country's Web site is of less importance.

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Web Site Notes

Starwood Hotels added two languages over the past year: Italian and Chinese (Simplified).

Best Western added support for Danish, Greek, and Chinese (Simplified and Traditional).

InterContinental Hotels added Korean.

Radisson added Chinese (Simplified and Traditional).

InterContinental Hotels now uses geolocation to direct users to its local Web sites. It is the only hotel to use geolocation.

Starwood Hotels and **Accor** both make use of language negotiation. Since hotels generally take a language-oriented approach to Web globalization, language negotiation is an excellent way to seamlessly direct Web users to content in their language.

None of the hotel Web sites uses a splash global gateway.

Hilton is one of only a handful of the 225 Web sites studied that offers a choice of American and British English. The British site was well translated – from "theatre" to "organised" to "centre."

The best global gateways were the simplest – a pull-down menu in the upper right corner that provided easy access to the available languages.
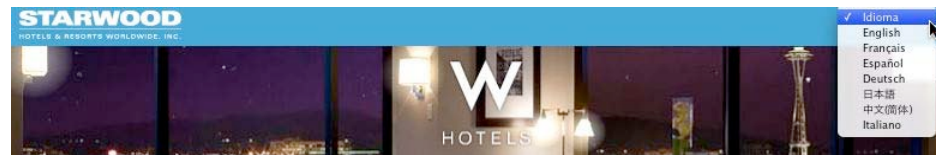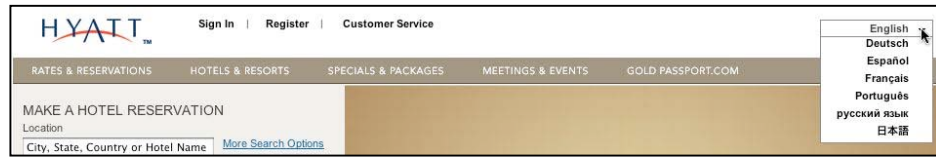
We recommend positioning a globe or map icon next to the menu to improve its usability.

Hilton does not give its pull-down menu the same priority as its competitors, positioning the menu at the bottom of the Web page.

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Carnival uses the same gateway that it used last year. We point it out again because it exhibits two practices companies should avoid. First, there are the flags positioned in a place that is commonly used by Web sites for global navigation. It is likely that people will click on the flags hoping to get where they need to go. Yet these flags are used for decoration only.
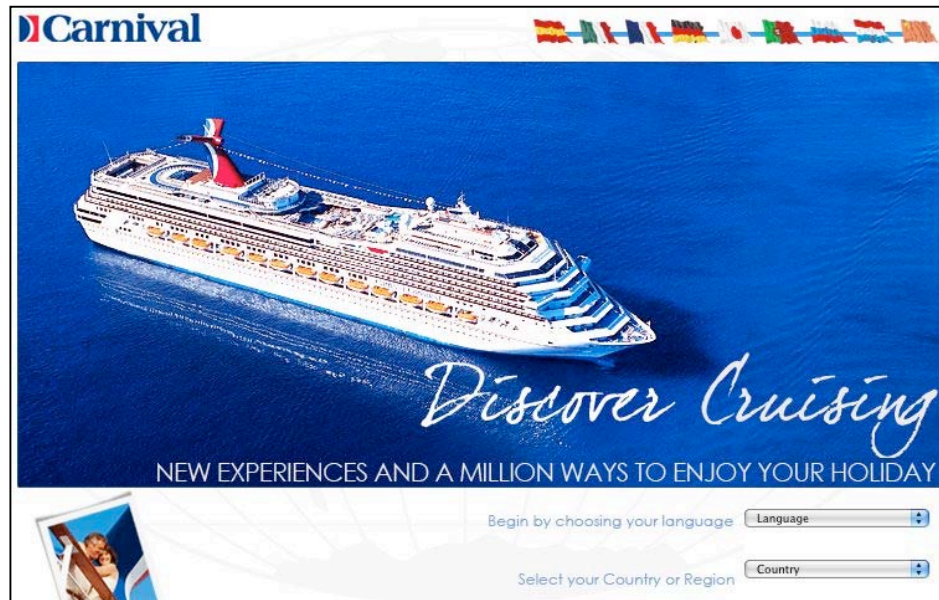
Second, the gateway itself is presented as two pull-down menus. The user must first select a language and then a country. This approach is overly complex and possibly off-putting. For starters, if a person does not speak English very well, they may not know which menu to use first.

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And, as shown here, the gateway implies that the Portuguese spoken in Brazil and Portugal are the same, which is not the case and is often a sensitive issue in these two countries.

Best Western places language links in the reservation section, to make it clear that Web users can make reservations in up to seven languages.

Because Best Western has no other global gateway on its Web site, it creates the impression that these are the only languages supported by Best Western, which isn't the case. Best Western actually supports 29 languages.

While displaying languages in this fashion isn't by itself a bad idea, it is important that Best Western also provide a global gateway.

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Industrial/Diversified

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Caterpillar	87	25	23	25	14
John Deere	80	25	19	21	15
Dow Corning	77	24	23	24	6
GE	76	25	14	20	17
Cargill	76	24	20	17	15
Alcoa	74	24	18	16	16
Siemens	70	18	18	12	22
Steelcase	68	25	6	18	19
Cemex	61	20	16	15	10
Honeywell	58	21	12	13	12
Briggs & Stratton	56	20	14	12	10
Sherwin-Williams	35	8	12	10	5

Source: Byte Level Research

Overview

Caterpillar comes out on top for an impressive third year in a row with a perfect score in both global consistency and navigation.

There have been noticeable improvements in the Web sites of John Deere, GE, and Steelcase, with John Deere ascending from 5th place in 2007 to second place this year.

The majority of the Web sites in this category now rely on global design templates, with John Deere, Caterpillar, GE, and Steelcase scoring a perfect 25 in this category.

In terms of languages, Siemens leads the category with support for 34 languages, followed by Steelcase, with 29 languages.

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Web Site Notes

To give you an idea of how far Caterpillar has come in improving its global navigation, below are two screen shots of the Caterpillar header.

2004

2008

Notice the addition of the permanent global gateway link – a huge improvement in global navigation – and one reflected across many more Web sites these days.

Caterpillar has significantly increased its depth of content for China, Russia, and India. The company also tweaked its global design to give local sites additional room for local content and promotions.

Caterpillar offers RSS feeds in English and is in the process of expanding these feeds across other languages.

The Web sites that use splash global gateway pages are **Briggs & Stratton, Caterpillar**, and **Honeywell**.

Last year, only **Caterpillar** used geolocation to improve global navigation. This year, **Steelcase** also uses geolocation.

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John Deere and **GE** made improvements to global navigation over the past year. Both now use a map icon in the "sweet spot," which improves usability. Below is a "before" and "after" of the GE gateway:

2006
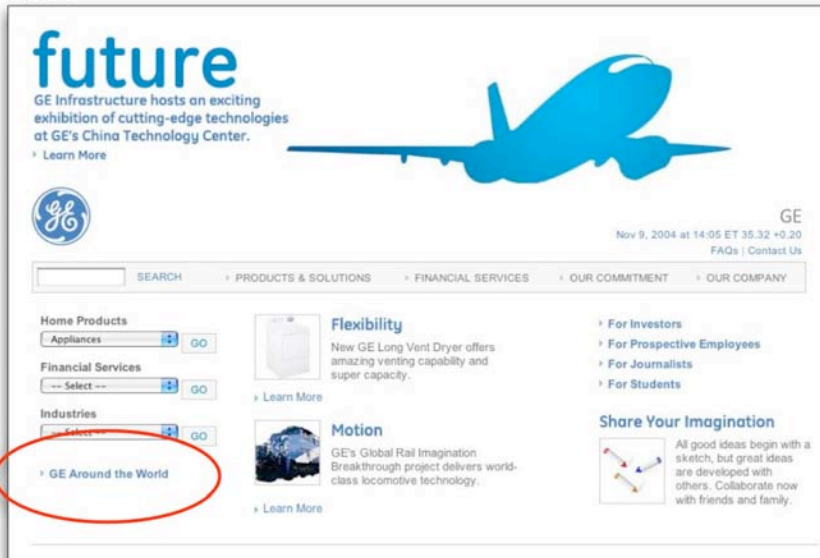
2008
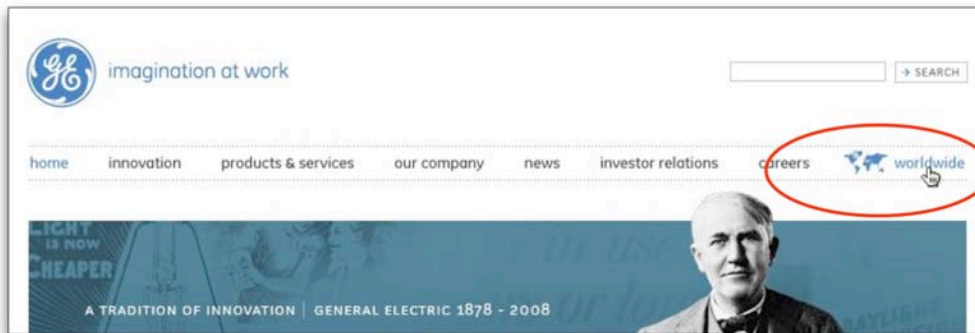
As shown below, John Deere improved upon its global gateway by replacing the pull-down menu with a link to a gateway page.

GE removed flags from its global gateway, as shown below. The use of flags for navigation is generally not the best idea due to cultural and political sensitivities; for example, Web users in China generally do not approve of the use of the Taiwan flag.

2007

2008

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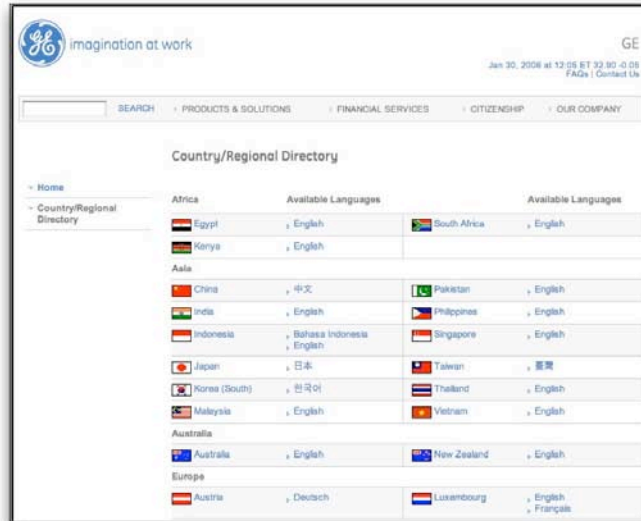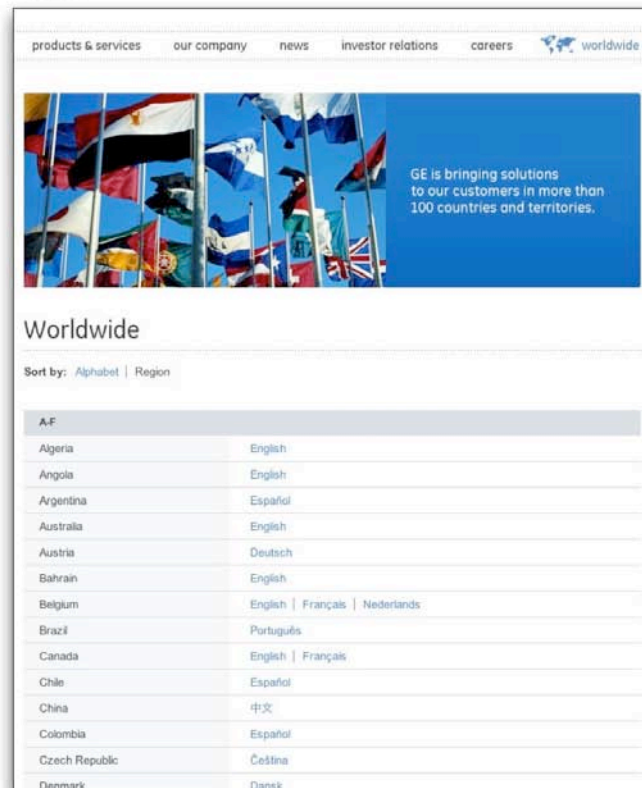
Dow Corning uses one of the better globe icons we have seen.
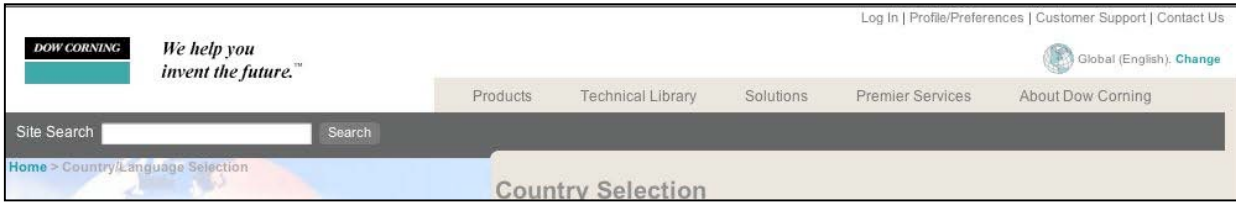
Briggs & Stratton and **Caterpillar** are the only two companies to offer Spanish sites for the US market.

Steelcase was one of the most-improved Web sites over the past year. The site added an impressive 23 languages, though the majority of new languages support only one-page "business card" sites. Steelcase also uses a global design template across all localized sites. Steelcase now needs to focus on filling out these local sites with content.

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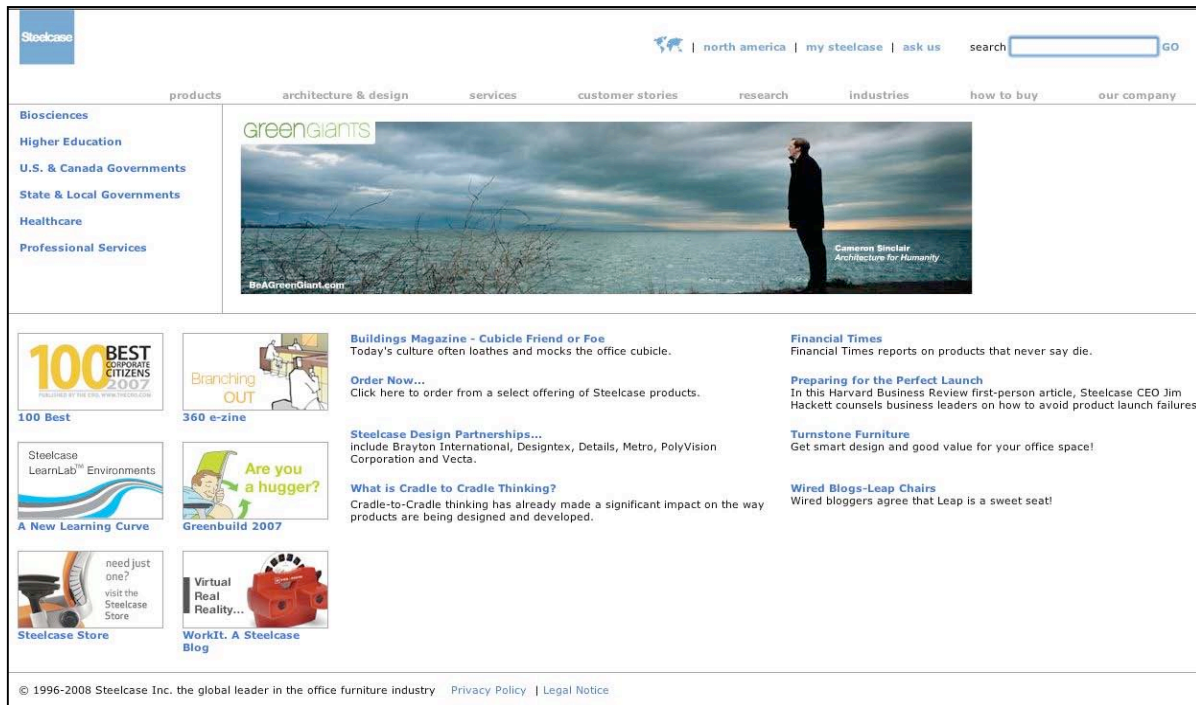
Media/Entertainment

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
BBC	79	23	24	8	24
LexisNexis	69	20	22	16	11
Harry Potter	67	23	18	9	17
Warner Brothers	58	19	18	12	9
CNN	52	20	24	2	6
ESPN	45	11	22	8	4
Disney	39	5	19	1	14

Source: Byte Level Research

Overview

This is a broad category, including a diverse range of publishing and media companies. The BBC came out on top, for a third year in a row, with support for 39 languages.

LexisNexis is in the midst of a global redesign that is already showing progress. Its new global design and global navigation helped the site improve its score significantly, pushing it to second place.

Web Site Notes

CNN and **Disney** both use geolocation to direct users based outside of the US to their international Web sites.

While the **BBC News** is the clear leader in language support, it does not provide the most ideal global gateway. Only a small selection of available languages are presented on the home page.
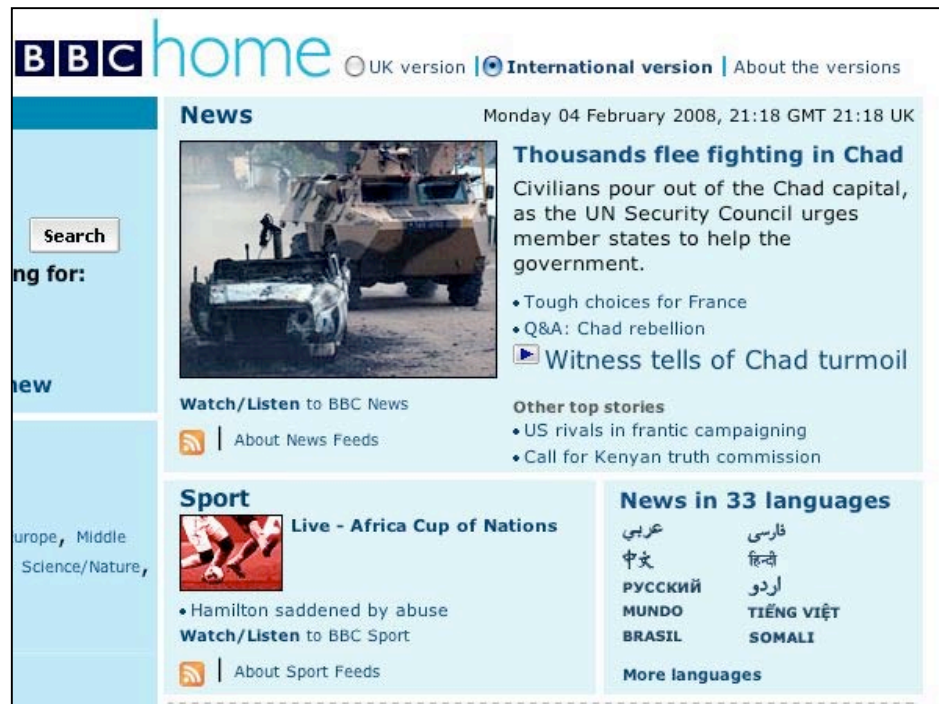
Harry Potter continues to add languages, up from 10 in 2006 to 24 this year. It added three languages in 2007: Polish, Turkish, and Chinese (Traditional).

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Disney launched a new design this year. Unfortunately, global navigation and consistency was not addressed in the redesign. The link to the global gateway, shown below, is buried near the bottom of the home page.

Fortunately, Disney also makes use of geolocation to enhance navigation. Shown below is the screen that users outside of the US see if they input **www.disney.com**.

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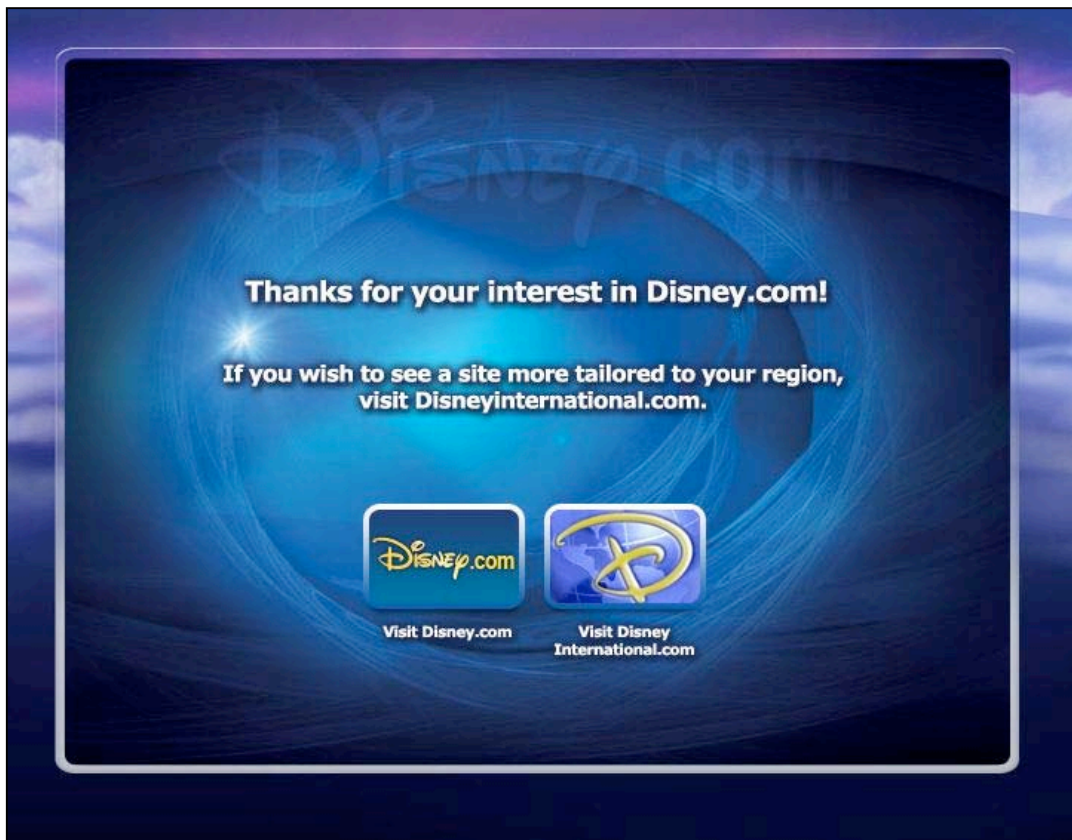
LexisNexis greatly improved its global gateway, replacing flags with a map that links to a gateway page. This new Web design is the beginning of global redesign that will support greater global consistency and user-friendly navigation across all languages. Geolocation will also be supported later in 2008.

2007

2008

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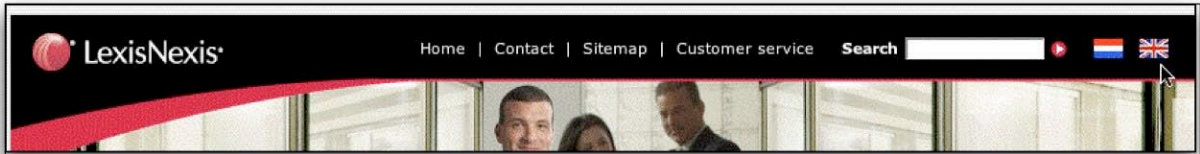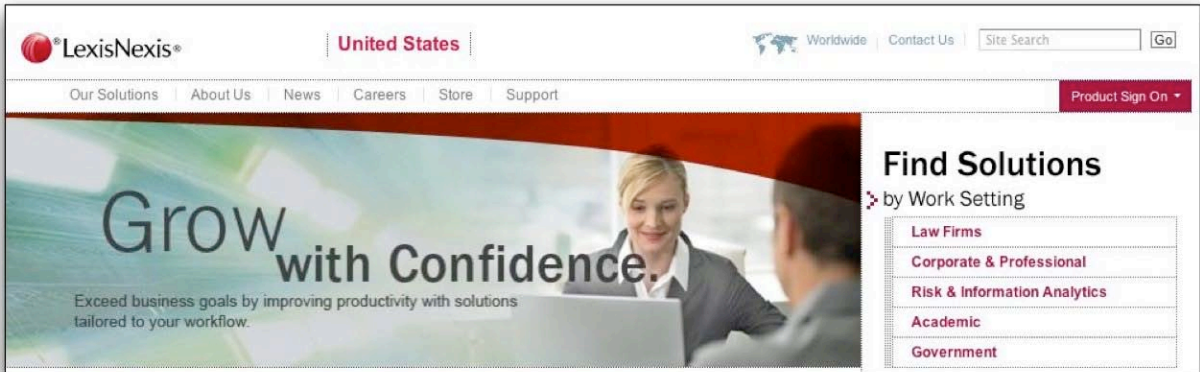
Medical/Pharmaceutical

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Merck	75	25	18	14	18
Wyeth	63	15	19	13	16
Siemens Medical	62	13	18	17	14
Sanofi-Aventis	61	22	16	5	18
Eli Lilly	60	21	14	11	14
Medtronic	57	20	11	10	16
Bayer	54	15	16	5	18
Novartis	54	15	12	12	15
Monsanto	53	19	17	7	10
Genzyme	48	19	16	3	10
Boston Scientific	41	15	16	2	8
Pfizer	40	3	19	1	17

Source: Byte Level Research

Overview

These companies were very busy increasing languages over the past year, with nine companies adding an average of 3.6 languages each.

Merck came out on top for the third year in a row, supporting 27 languages, the most of any company in this category. Sanofi-Aventis is fast-approaching Merck in languages, adding six in 2007, for a total of 26. Pfizer added seven languages last year, giving it a total of 25.

Boston Scientific dropped out of second place due to a poor global redesign, replaced by Wyeth.

Web Site Notes

Pfizer added language support for French (Canada), Portuguese (Portugal), Polish, Hungarian, Greek, Thai, and Indonesian.

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Sanofi-Aventis added Greek, Korean, Chinese (Simplified and Traditional), Thai, and Indonesia.

Bayer was also busy in 2007, adding Portuguese (Portugal), Ukrainian, Croatian, Hungarian, and Slovak.

In general, the sites in this category did a poor job with global navigation. The **Bayer** gateway, shown here, is squeezed in between other pull-down menus, which makes it difficult to find.

If that isn't challenging enough, Bayer also offers a global gateway page that includes yet more pull-down menus:
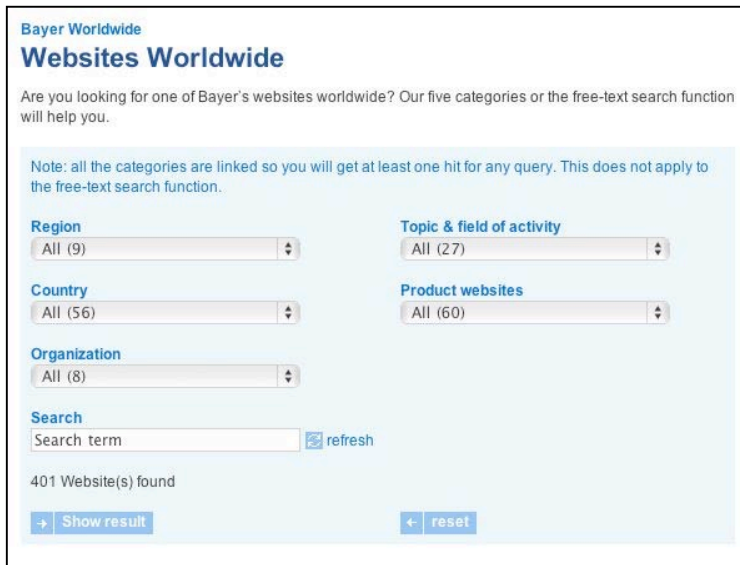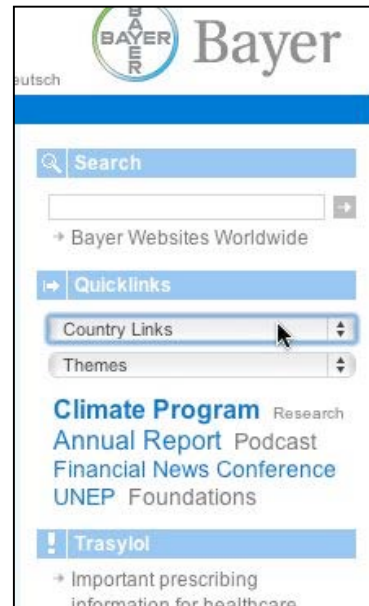
Only one Web site in this category uses a splash global gateway: **Siemens Medical**.

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Boston Scientific redesigned its Web site over the past year and, in doing so, made global navigation worse. As shown here, the current version offers the user just two choices: the US and "International." The international site is in English and offers no links that we could find to the localized Web sites. It could be that Boston Scientific is in the process of a global redesign. Nevertheless, it is unusual to see a company actually remove the links to its localized Web sites.

Medtronic uses Unicode as the encoding of its pull-down global gateway menu. The nice thing about this approach is that the

languages can all be displayed in their native script. Keep in mind, however, that users must have the necessary fonts on their computers to view all these scripts.

This is generally not a problem with the intended audience but can be an issue with people outside the target markets, namely the US.

✓ Medtronic Worldwide
International Products
Contact Us Worldwide
Australia
Belgium
Brasil
中国 (China)
Česká Republika
Danmark
Deutschland
España (Spain)
Europe
France
India
(Israel) ישראל
Italia
日本 (Japan)
한국 (South Korea)
Magyarország (Hungary)
México
(Middle East) الشَرق الأوسط
Nederland
Norge
Polska (Poland)
Portugal
Österreich
РОССИЯ (Russia)
Schweiz
Slovenská Republika
South Africa
Suomi
Sverige
Taiwan
Türkiye
United Kingdom

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Non-profit/Government

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
European Union	80	24	22	18	16
Voice of America	79	21	19	14	25
World Bank	73	17	23	19	14
OCLC	70	21	21	19	9
United Nations	69	24	22	17	6

Source: Byte Level Research

Overview

The European Union Web site, with support for 23 languages, leads this category for the second year in a row. However, Voice of America News, a new entrant this year, finished strong, with support for 48 languages, including Hindi, Tamil, Pashto, Persian, Urdu, Lao, and Khmer.

Interestingly, all sites but the EU take a language-oriented approach to Web site architecture. Given this approach, it would make great sense for the sites to begin using language negotiation to improve usability, yet none of the sites have done so yet.

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Web Site Notes

Both the **World Bank** and **OCLC** use a globe icons to improve global navigation. Here is the World Bank header:

OCLC, a new entrant this year, does a good job of managing user expectations. Note how some of the links feature an "inglés" suffix to let the user know what language awaits.

The **European Union** gateway is unique in its use of two-digit language codes for navigation, shown here:
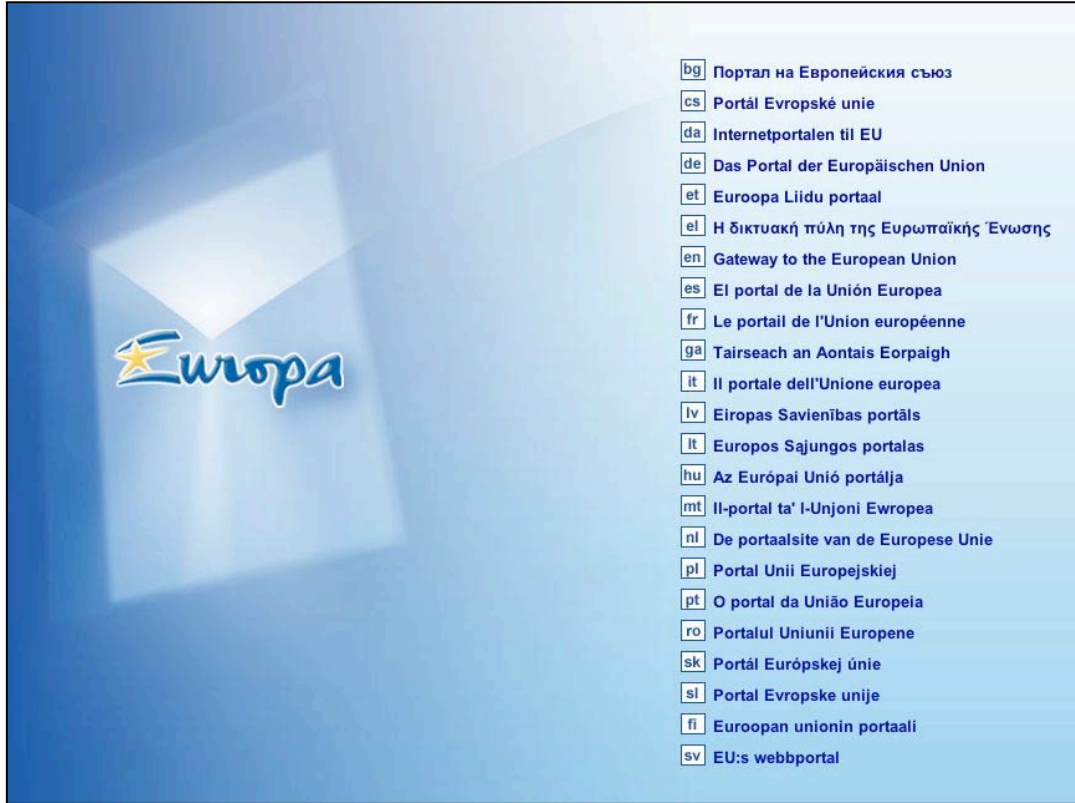
We have only seen a handful of Web sites use the two-digit language codes for navigation, and it remains to be seen if this device will spread to more sites. We doubt it, simply because two-digit codes are in Latin characters only, which doesn't translate well to parts of the world that don't use Latin characters.

It's also worth noting that the European Union now uses the new **.eu** domain, at **www.europa.eu**.

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Professional Services

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Deloitte Touche Tohmatsu	84	25	22	16	21
PricewaterhouseCoopers	80	25	18	15	22
KPMG	70	25	16	10	19
Ernst & Young	68	25	15	11	17
Capgemini	61	23	11	12	15
Jones Day	53	25	11	8	9
Bearing Point	42	21	5	5	11
McKinsey & Co	29	12	4	3	10

Source: Byte Level Research

Overview

Deloitte emerges on top for a fifth year in a row as it continues to add languages and country Web sites. In addition, Deloitte continues to innovate locally with support for local news feeds and podcasts across a number of countries.
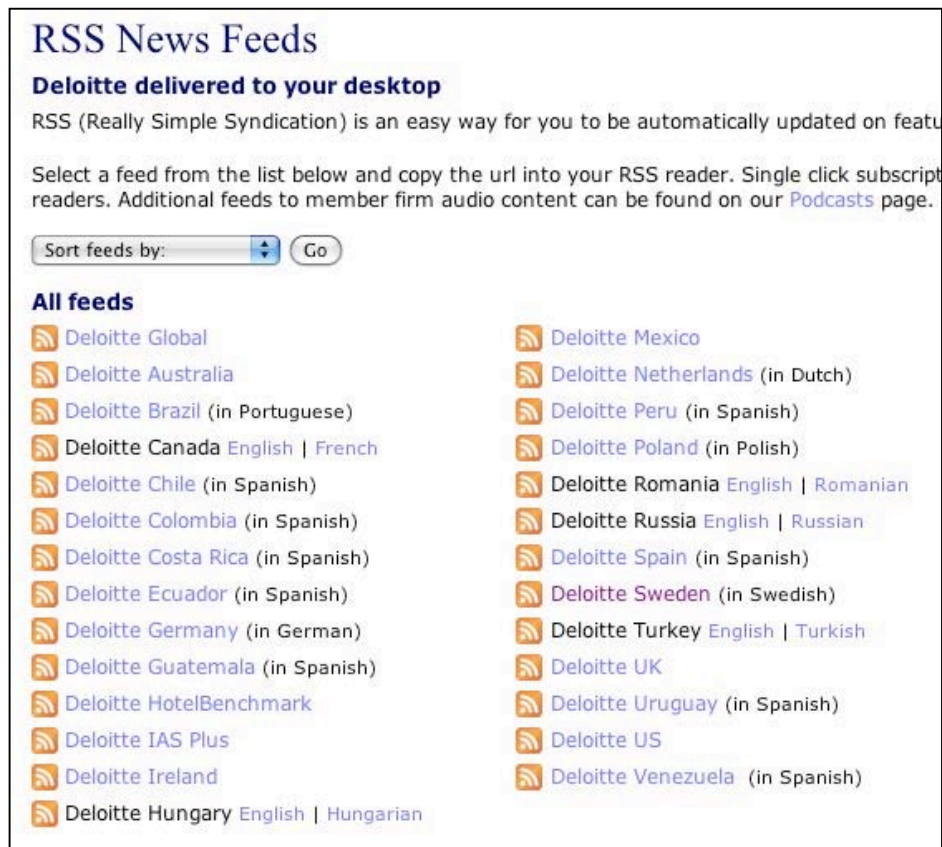
PricewaterhouseCoopers did not add any languages in 2007 but still leads Deloitte (barely) with support for 34 languages. Deloitte is on track to support 34 languages later this year when it launches Azeri language support on its Azerbaijan Web site.

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Web Site Notes

Most Web sites make good use of global templates. In regards to global navigation, none of the sites use splash global gateways.

Only **Deloitte** makes use of geolocation to improve navigation.

Deloitte offers a wide range of local RSS feeds, shown here:

Deloitte is a highly decentralized company, yet you would never know it by looking at the many country sites. Over the years, Deloitte has implemented a global design template that the member firms support, filling out with their own content.

And it's on the local level where things get exciting. Shown below is a Web page from the Deloitte UK Web site promoting a popular annual report on the European football clubs.

Notice how Deloitte does a great job of integrating a podcast and mobile delivery option. In addition, Web users can download the report by completing a Web form – an excellent way of generating leads.

Deloitte uses icons to differentiate between the four ways the user can choose to have content delivered: iTunes, Email, Mobile, and

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RSS feeds.

Speaking of iTunes, below are the podcasts developed by Deloitte Canada which are available on the iTunes store for free. Podcasts are available in English mostly, with a few French podcasts as well.

The important lesson here is that successful local content is not limited any longer to text translated at headquarters. Increasingly, companies are letting their office create local content across all types of media.

McKinsey showed signs of increasing the depth of localized content, though it did not add any languages in 2007, nor did it improve on its global navigation.

PricewaterhouseCoopers Brazil, shown below, is nicely localized, with contact information easy to find. We recommend replacing the pull-down global gateway with a link to a global gateway Web page.

Jones Day also increased its depth of localized content, primarily in the news section.

Jones Day and **McKinsey** have developed language-oriented Web sites while the rest of the Web sites take a country-oriented approach to Web architecture.

Bearing Point added three languages in 2007: Finnish, Swedish, and Czech. The company also offers news and podcast RSS feeds in English but currently in no other languages.

Ernst & Young added four languages in 2007: Ukrainian, Icelandic, Korean, and Chinese (Traditional).

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CapGemini added a localized Web site for Romania.
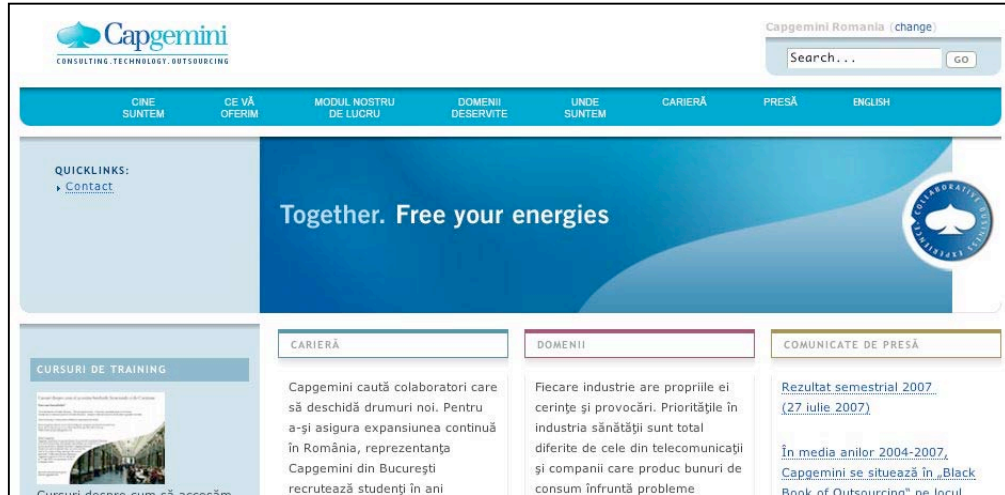
KPMG added two languages in 2007: Chinese (Traditional) and Thai.

KPMG continues to use a poor global gateway, shown below. The name "Site Selector" is not intuitive to non-English speakers. At a minimum, we recommend adding a globe icon next to the link.

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Rental Cars

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Hertz	**70**	23	20	15	12
Dollar Rent A Car	**53**	20	17	13	3
Thrifty	**44**	19	17	5	3

Source: Byte Level Research

Overview

Hertz finished on top for the second year in a row, and added two more languages – Portuguese (Portugal) and Chinese (Simplified). The other two sites remained static.

None of the Web sites does a particularly good job of supporting global navigation. Although Hertz positions its global gateway in the correct location, the gateway relies on a two-part pull-down menu that is cumbersome to use.

The user must first select a country and then a language before being taken to the Web site. The trouble with this approach is that the user may select the country and not know that there are other languages supported (English is displayed by default).

Retail/Restaurant

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
IKEA	80	22	22	19	17
Subway	68	20	20	14	14
Build-a-Bear	64	20	20	13	11
Tiffany	61	20	18	20	3
Godiva	51	20	19	9	3
Starbucks	48	14	18	5	11
McDonald's	47	2	20	7	18
Wal-Mart	29	5	17	0	7
J. Crew	23	10	5	6	2

Source: Byte Level Research

Overview

We define this industry segment to include those companies that have a physical presence in the countries they do business in. This eliminates a company such as Amazon, and it greatly narrows the selection of global Web sites, as most "bricks and mortar" retailers have been slow to expand into new markets. **For bricks and mortar retailers, the world is not quite as flat as it is for their virtual competitors.**

IKEA continues to dominate this category, emerging on top for a fifth year. But IKEA also did little to improve its global sites over the past year, while companies such as McDonald's and Build-A-Bear have continued to add languages and locales. In fact, McDonald's passed IKEA this year in number of languages supported – with 26.

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Web Site Notes

Three out of the eight Web sites reviewed now use splash global gateways: **IKEA**, **McDonald's**, and **Tiffany.**

Tiffany uses one of the most elegant splash global gateways we have seen:

Wal-Mart exited Germany and, as a result, also shut down its German Web site. It was the only site in this category to support fewer languages in 2008 than in 2007.

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McDonald's added two languages: **Romanian** and **Slovenian**.

Starbucks added one language in 2007: French (Canada).

Starbucks also modified its global gateway, though not for the better. Up until 2007, Starbucks simply used a pop-up menu that was sized to be as large as the list of countries. Now, the pop-up menu is a fixed size, requiring the user to scroll down the list.

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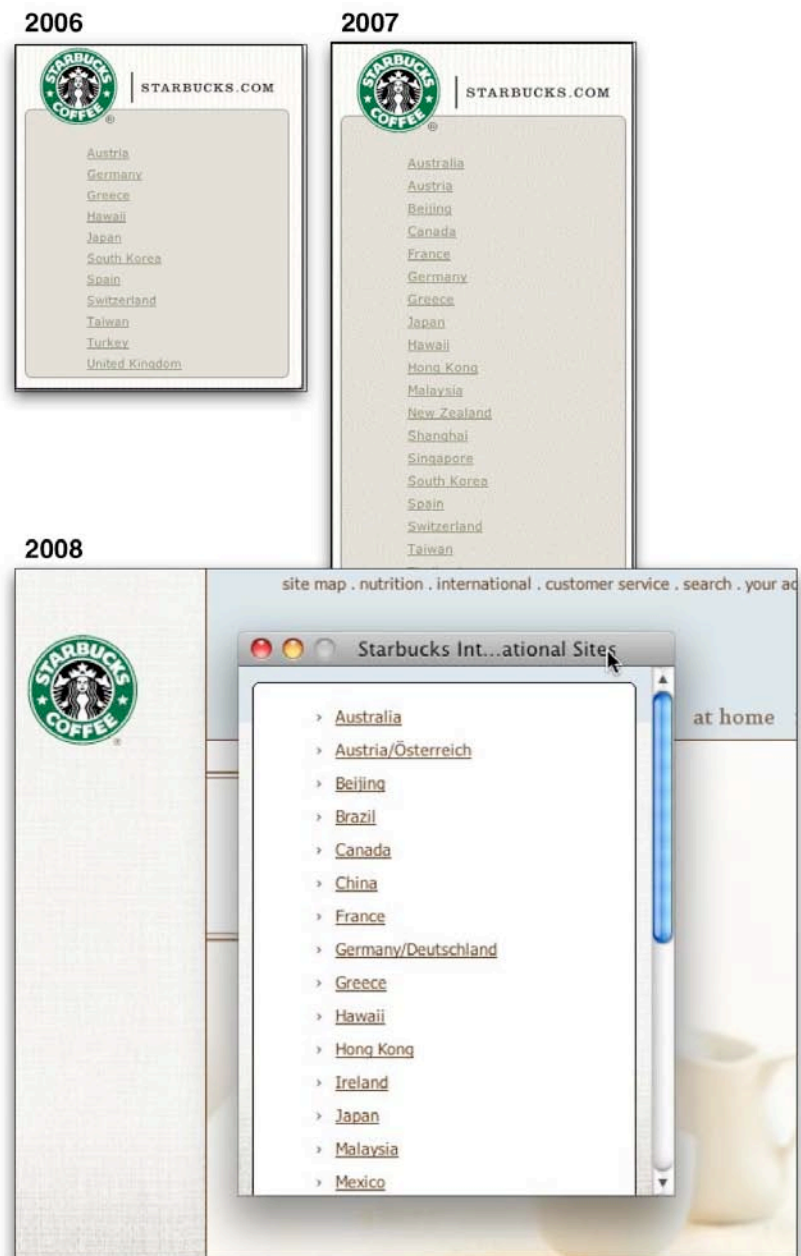
Semiconductors

Web Site Ranking by Industry

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Texas Instruments	78	25	23	20	10
Intel	77	25	22	15	15
Renesas	77	25	24	22	6
AMD	75	25	16	22	12
NVIDIA	72	25	17	19	11
National	60	23	13	19	5
Freescale	57	22	9	14	12
Fairchild Semiconductor	55	22	11	18	4
Broadcom	54	24	10	15	5
NXP Semiconductors	51	21	9	12	9
Analog Devices	48	24	10	10	4
ST Microelectronics	40	22	10	3	5

Source: Byte Level Research

Overview

Texas Instruments finished at the top for the second year in a row, although Intel and Renesas finished close behind.

Intel leads this category in languages, with support for 21. Yet Texas Instruments stayed out in front by continuing to add languages (3 in early 2008) as well as RSS feeds and local-language customer support.

Meanwhile, Renesas leads in depth of localized content, proving that you don't need to support a large number of languages to do well in overall scoring.

Should Intel improve upon its global navigation in 2008, we might see a different leader a year from now.

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Web Site Notes

Two new companies were added to this category this year: **NVIDIA** and **NXP Semiconductors**. NVIDIA finished very strongly overall, with support for 12 languages and a highly consistent global design.

The **NVIDIA** gateway is well positioned in the upper right corner. However, we noticed the use of three-letter abbreviations for each country. This is something we've never seen before and do not recommend. Instead, we recommend translating the country names for relevant markets.

Freescale added Hebrew, joining Intel as the only two sites in this category to support this language.

Renesas adds Russian to its language portfolio in 2008. It also increased the depth of its Chinese content and offers RSS feeds in both English and Japanese.

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Renesas is the only company in this sector to use a splash global gateway, something the other sites could benefit from using.
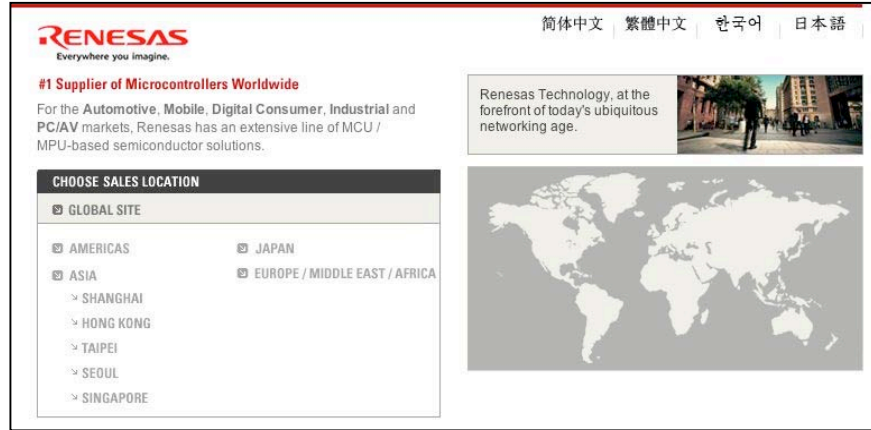
Because semiconductor companies are highly focused on appealing to Asian technology executives, the links to the Asian sites are often made more prominent, as shown below.

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Texas Instruments added sites for Poland, Hungary, and the Czech Republic. In 2007, TI added significant content to its Japanese site. It also added RSS feeds for Chinese (Simplified) and Japanese. Here is a screen shot of the Chinese feeds (www.ti.com.cn/footer_rss).

TI is also rolling out "click-to-chat" customer support for its Russian site. One thing we particularly liked about TI's Russian site is its contact phone number, prominently displayed.
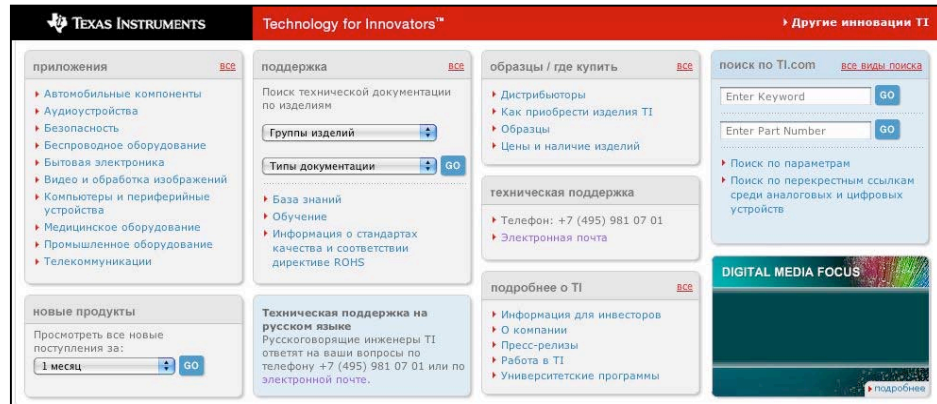
Intel added support for Chinese (Traditional).

Intel is the only company to offer Spanish content specifically for the US market.

167

The **Intel** global gateway starts off strongly but does not finish well. As illustrated below, Intel makes excellent use of a map icon to bring Web users to a global gateway page. Unfortunately, the global gateway page suffers from a few too many pull-down menus.

Intel uses a map icon to link to its global gateway.

The icon is very effective in communicating its purpose across all languages.

However, after clicking on the map icon, users are taken to a global gateway page that is not user friendly if you do not speak the default language of that Web page.

Instead of a pull-down menu, we recommend using a landing page that displays links to all country Web sites, grouped by region.

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AMD, like Intel, uses a map icon at the top of the page, which links to a global gateway page:

But the global gateway page is much better than Intel's gateway page. There are no pull-down menus. The countries are organized regionally, and the languages are translated.

In addition, when a language is selected, a pop-up window appears that asks if the user wants this target site to be the default site upon return visits. It's a nice touch.

169
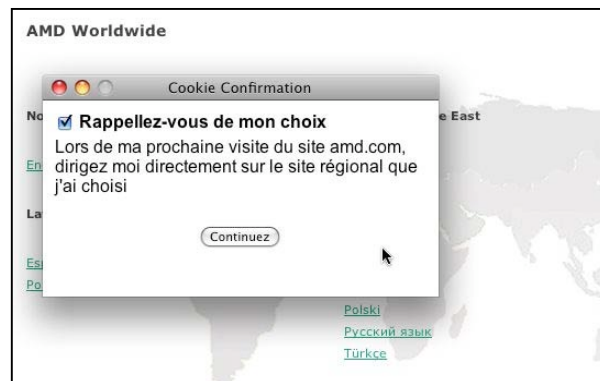
We came across a pop-up survey on a Spanish-language **Intel** Web site. The survey, unfortunately for Spanish-speaking Web users, was in English. Effective Web localization is measured by attention to details such as these.

Another detail worth highlighting is a pop-up error message we received when completing a form on the Spanish-language **NVIDIA** site. The pop-up message is in English.
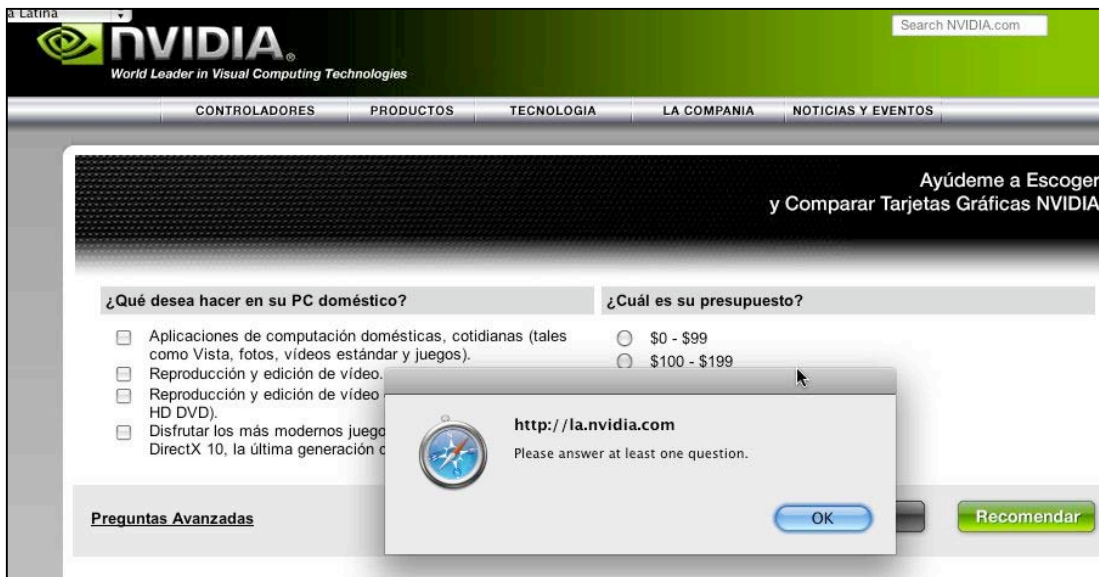
Social Networking

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
XING	83	25	21	25	12
Last.fm	81	25	23	23	10
MySpace	76	25	22	18	11
Orkut	73	25	20	15	13
Facebook	42	25	15	0	2

Source: Byte Level Research

Overview

A new category this year, social networking includes Web sites that didn't even exist a few years ago. But even though these are new sites, they demonstrate impressive global attributes, such as global consistency, the use of geolocation and language negotiation, and largely text-based architectures.

XING emerged on top due to very impressive global navigation, global consistency, and support for 16 languages.

Web Site Notes

Every site in this category scored a perfect 25 on global navigation. These sites were designed from the beginning to be globally consistent yet locally flexible.

Both **XING** and **MySpace** use geolocation.

XING, **Last.fm**, and **Orkut** use language negotiation.

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Only **XING** uses both geolocation and language negotiation. These backend technologies, combined with the global gateway shown below, make XING one of the best examples of global navigation on the Internet today.

Facebook relied on more than 1,500 volunteer Web users to help it translate its interface into Spanish. Shown below is the settings page that users must use to change their language preference. We found this setting difficult to find.

The Web user must understand English to even navigate these settings. In the future, Facebook must make this process easier for someone who does not speak English.

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MySpace has been aggressively localizing its Web site, but its navigation needs improvement. Shown here, the link to the global gateway is buried at the bottom of the Web page.

The gateway page, shown here, looks very similar to the gateway pages used by Yahoo! and AOL. This page is generally well done, though the country names should be translated appropriately.

173
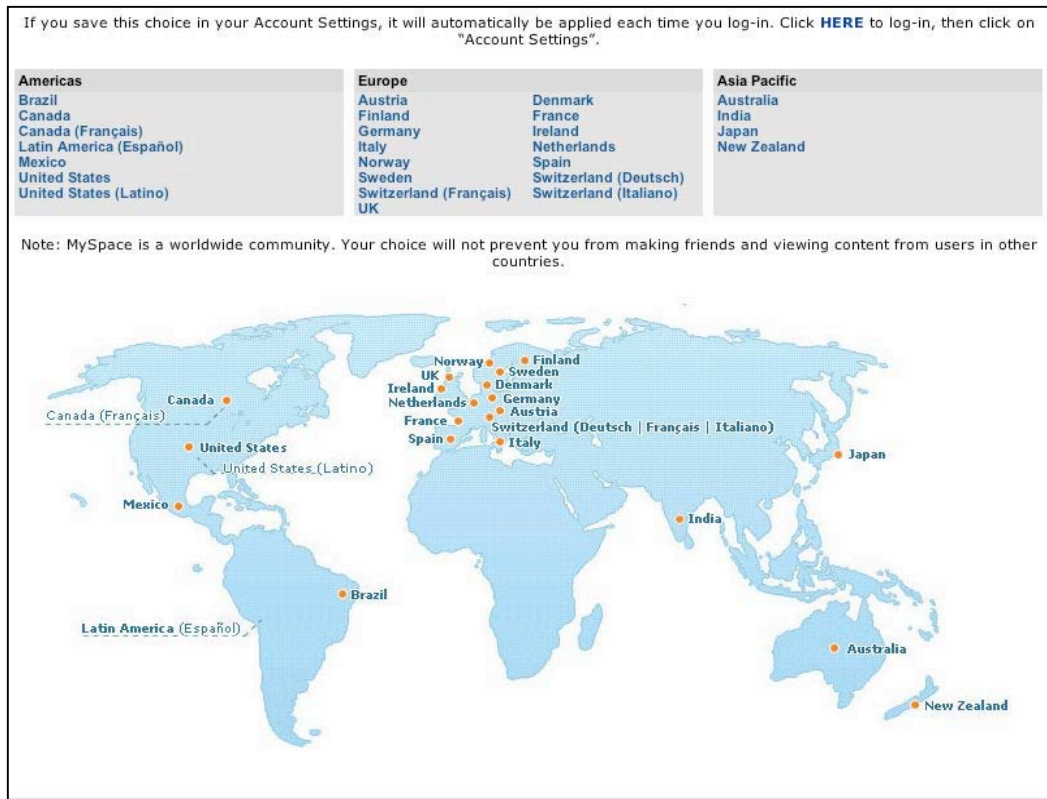
Orkut, a Google property, leads this category with support for 16 languages, including Portuguese (Brazil), Telugu, and Bengali. Although this networking service was developed by a Turkish software developer (shown below) for a US-based company, it is now the number one social networking service in Brazil.

Sporting Goods

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Adidas	75	25	15	23	12
Nike	62	19	17	13	13
Reebok	61	14	17	17	13
Columbia	55	21	10	14	10
New Balance	53	11	18	13	11
Patagonia	39	18	10	8	3

Source: Byte Level Research

Overview

Adidas emerged on top for a third year in a row, although Reebok surpassed Adidas with 17 languages.

The changes to these sites over the past year have been minor. New Balance has made modest improvements in global consistency over the past year and Nike made a slight improvement to global navigation, though it still has a ways to go.

Web Site Notes

Four Web sites now use splash global gateways: **Nike, New Balance, Patagonia,** and **Reebok**.

Adidas is the only company in this category to use geolocation.

175

Although **Patagonia** creates the impression that it supports a number of localized Web sites through its global gateway, the site only supports two languages other than English: French and Japanese.
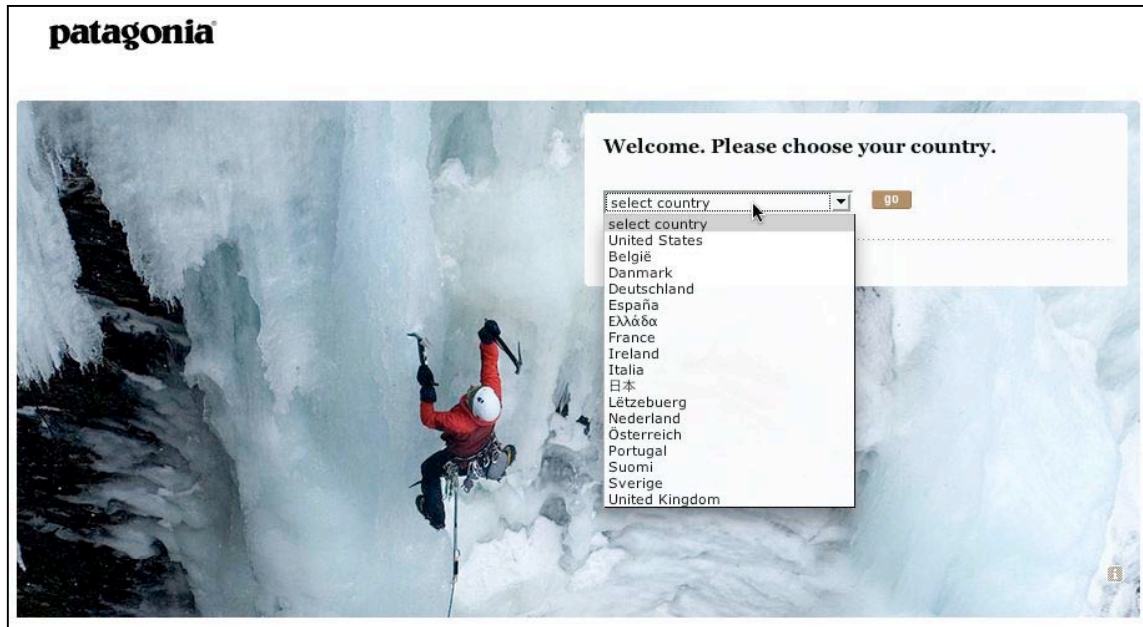
It is important to make it clear to Web users before they select a country site exactly what language or languages are supported by that site. In the case of Patagonia, the country names are translated, creating the impression that the local Web sites are as well.

Adidas added two languages in 2007: French (Canada) and Polish.

Reebok also added two languages over the past year: Russian and Hungarian.

Nike and **Columbia** each added one language: Czech.

Columbia is the only site in this category to use language negotiation. However, Columbia has much room for improvement in localization. For example, the Japan site, shown here, has about as much English-language content as Japanese content:

Nike launched a language-oriented gateway in 2007. This gateway presents a list of languages. When the user selects a language, a list of relevant countries appears. This gateway is better than the previous Nike gateway – which presented brands ahead of languages.
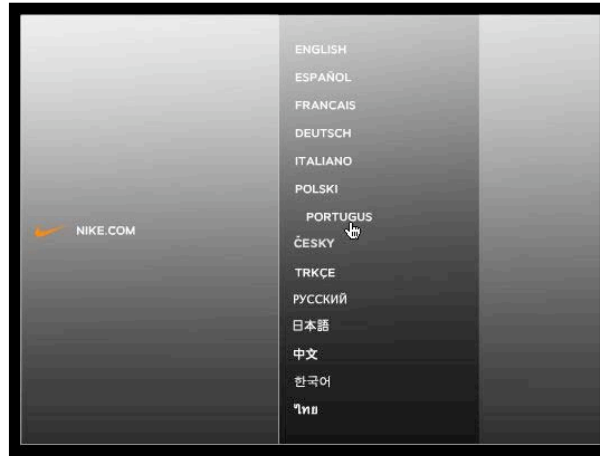
Recently, Nike applied this device to its country Web sites. If a user selects the country flag to change locales, the following overlay appears:
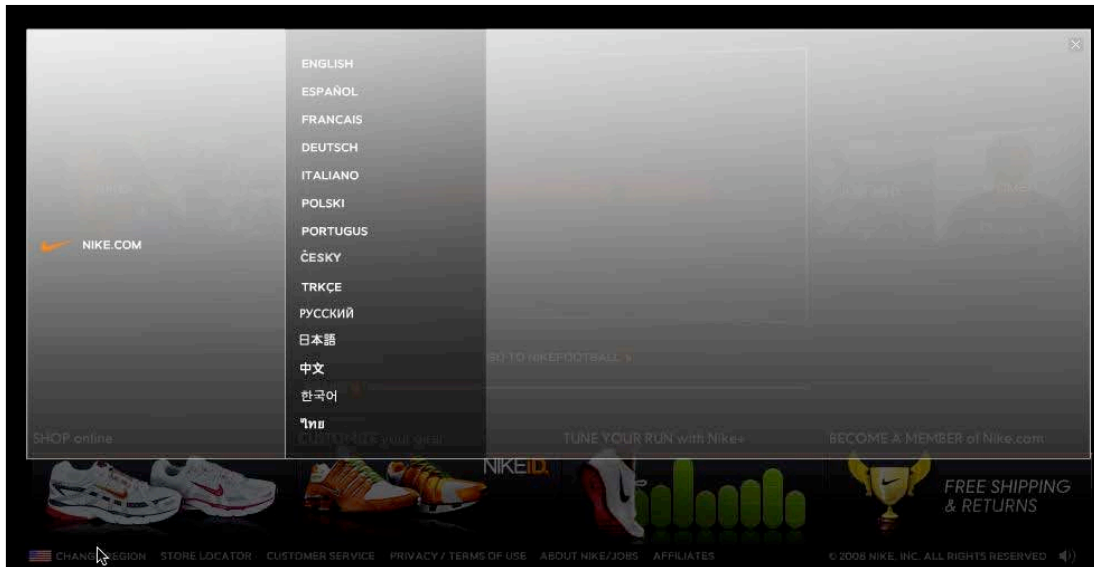
This is a nice improvement, though we still believe that Nike will eventually adopt a country-oriented gateway over the current language-oriented gateway.

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Video Games

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Xbox	84	24	21	23	16
Playstation	65	15	19	15	16
Nintendo Wii	64	24	17	14	9

Source: Byte Level Research

Microsoft	Nintendo	Sony
www.xbox.com	www.wii.com	www.playstation.com

Overview

This is a small but globally competitive category, representing the three major players in video game consoles: Sony, Nintendo, and Microsoft. These three companies are doing battle through dedicated brand Web sites, which we reviewed.

Xbox was the leader in this category in 2007 and leads again this year, although Playstation caught up in regards to languages supported. Nintendo did not add any languages over the past year and, as a result, was surpassed by Playstation in total score.

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Web Site Notes

Xbox was busy in 2007, adding six new languages, including Norwegian, Czech, Danish, Hungarian, Slovakian, and Brazilian Portuguese. This gave Xbox a total of 22 languages. The Xbox gateway, shown here, includes translated country names as well as a globe icon at the top of the Web page.

180
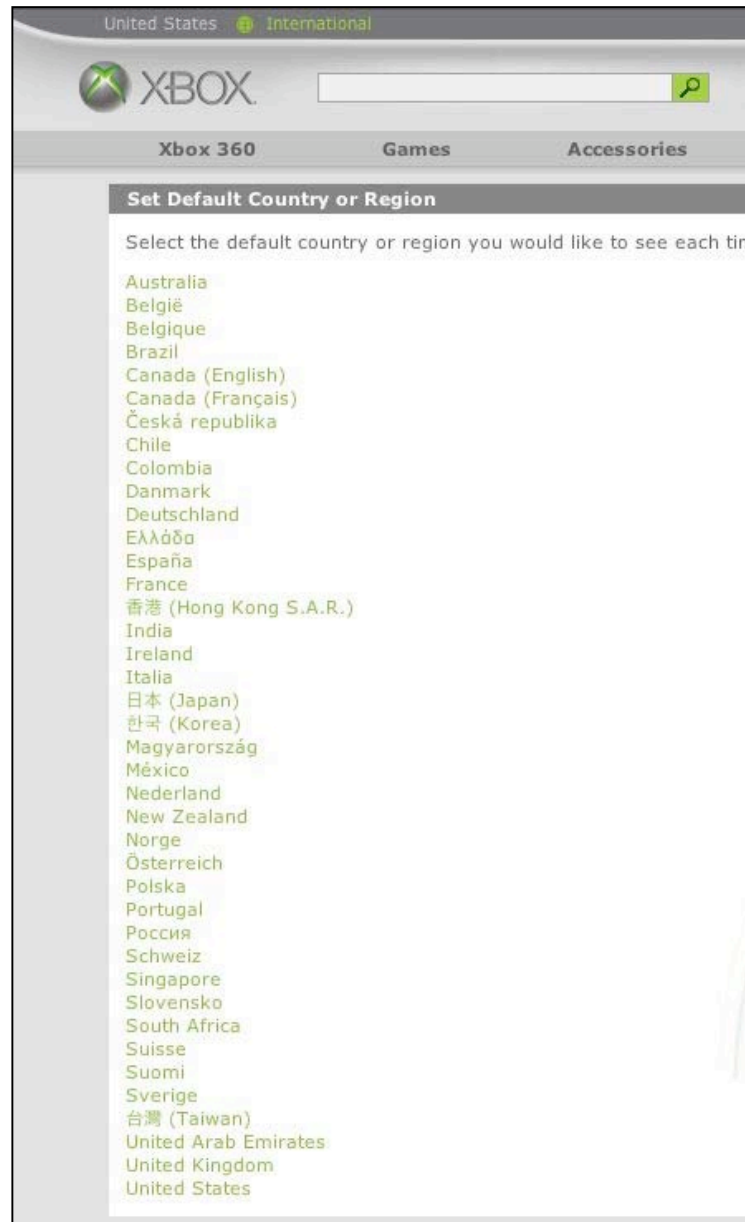
Playstation also saw in increase in languages, from 14 in 2007 to 22 today, brining it in line with the Xbox site. Languages added include Spanish (Spain), Brazilian Portuguese, Icelandic, Polish, Croatian, Hungarian, and Greek.

Although Playstation caught up to Xbox in languages, its global gateway was not improved, and the site still suffers from a serious lack of design consistency between regional and country sites. Lack of consistency will present problems should Playstation want to promote a new game to all local sites and find that it must reformat the visuals to fit the various designs; it also causes problems for providing a consistent user experience for visitors who may surf (or get lost) between sites.

Nintendo and **Playstation** both use splash global gateway pages. Neither Playstation nor Wii use cookies to save the user's locale preference so that the gateway page is bypassed on returns visits.

Xbox uses content negotiation to serve localized content. It detects the language preference of the user's browser and serves up that content, if it is available.

It's interesting to note that while **Playstation** and **Xbox** offer largely country-specific Web sites, **Wii** offers more language-oriented Web sites. This correlates with the fact that Wii offers the fewest number of localized sites.

Xbox offers country and language-specific user forums, shown below. We have found that user forums can be an excellent way to boost local-language content and with minimal investment.

Web Services

Web Site Scores

Company	Total Score	Global Consistency	Localization	Global Navigation	Global Reach (Languages)
Google	96	25	25	21	25
Wikipedia	94	25	25	19	25
Netvibes	86	25	16	20	25
Skype	82	24	22	19	17
PayPal	80	25	25	20	10
Salesforce.com	78	25	24	19	10
eFax	77	25	23	21	8
Yahoo!	76	24	25	7	20
Ebay	73	24	25	12	12
WebEx	73	21	23	20	9
MSN	72	25	25	3	19
AOL	71	25	23	11	12
Flickr	70	25	20	19	6
Snapfish	66	23	18	15	10
Amazon	63	20	25	10	8
Pageflakes	60	25	15	15	5
Monster	59	12	22	11	14
Hotels.com	55	17	17	8	13
Expedia	54	16	18	10	10
Ask	46	20	12	8	6

Source: Byte Level Research

Overview

This category includes companies that may not compete directly with one another but that live and die by the Internet – from search engines to hotel booking services.

Google continues to dominate this category, and for good reason. Even if you ignore Google's search engine, which is translated into 117 languages, and focus on another Google application, you will still find a significant investment in Web globalization. For example, Gmail supports more than 40 languages, which by itself is more languages than you'll find on most Fortune 500 Web sites.

As Google has expanded its offerings, global navigation has become more of an issue, one that cost the Web site a few points, though not enough to unseat it from its top ranking.

Web Site Notes

Google supports an impressive number of languages, not just within its search interface but also by its Web applications. This chart shows the level of language support across eight properties:

	Search	Adwords	Gmail	iGoogle	Blogger	Adsense	Google Apps	YouTube
Chinese (Simplified)	1	1	1	1	1	1	1	1
Chinese (Traditional)	1	1	1	1	1	1	1	1
Dutch	1	1	1	1	1	1	1	1
French	1	1	1	1	1	1	1	1
German	1	1	1	1	1	1	1	1
Italian	1	1	1	1	1	1	1	1
Japanese	1	1	1	1	1	1	1	1
Korean	1	1	1	1	1	1	1	1
Polish	1	1	1	1	1	1	1	1
Portuguese (Brazil)	1	1	1	1	1	1	1	1
Russian	1	1	1	1	1	1	1	1
English (US)	1	1	1	1	1	1	1	1
Czech	1	1	1	1	1	1	1	
Danish	1	1	1	1	1	1	1	
Indonesian (Bahasa)	1	1	1	1	1	1	1	
Norwegian	1	1	1	1	1	1	1	
Swedish	1	1	1	1	1	1	1	
Turkish	1	1	1	1	1	1	1	
Vietnamese	1	1	1	1	1	1	1	
Arabic	1	1		1	1	1	1	
Bulgarian	1	1	1	1	1	1		
Croatian	1	1		1	1	1		
English (UK)	1	1	1		1	1	1	
Finnish	1	1	1	1		1	1	
Greek	1	1	1	1	1	1		
Hebrew	1	1					1	
Hungarian	1		1	1	1	1	1	
Romanian	1	1	1	1	1	1		
Serbian	1	1	1	1	1	1		
Slovak	1	1	1	1	1			
Thai	1	1	1		1	1	1	
Ukrainian	1	1	1	1	1		1	
Catalan	1	1	1	1	1			
Filipino (Tagalog)	1	1	1	1	1			
Latvian	1	1	1	1	1			
Lithuanian	1	1	1	1	1			
Portuguese (Portugal)	1	1	1	1	1			
Slovenian	1	1	1	1	1			
Spanish (LatAm)	1	1		1	1	1		
Estonian	1		1	1	1			
Hindi	1		1	1	1			
Icelandic	1	1	1	1				
Spanish (Spain)	1		1					1
Urdu	1	1		1				
English (Australia)	1	1						
Persian (Farsi)	1					1		
Malaysian	1		1					
Albanian	1							
Azeri	1							
Bengali	1							
Bosnian	1							
French (Canada)	1							
Gaelic	1							
Gujarati	1							
Kannada	1							
Macedonian	1							
Malayalam	1							
Maltese	1							
Marathi	1							
Punjabi	1							
Tamil	1							
Telugu	1							

Google utilizes a **tiered Web globalization strategy**, in which some properties receive greater localization attention than others.

Google still has much room for improvement. As shown below, its navigation schemes vary quite a bit between properties.
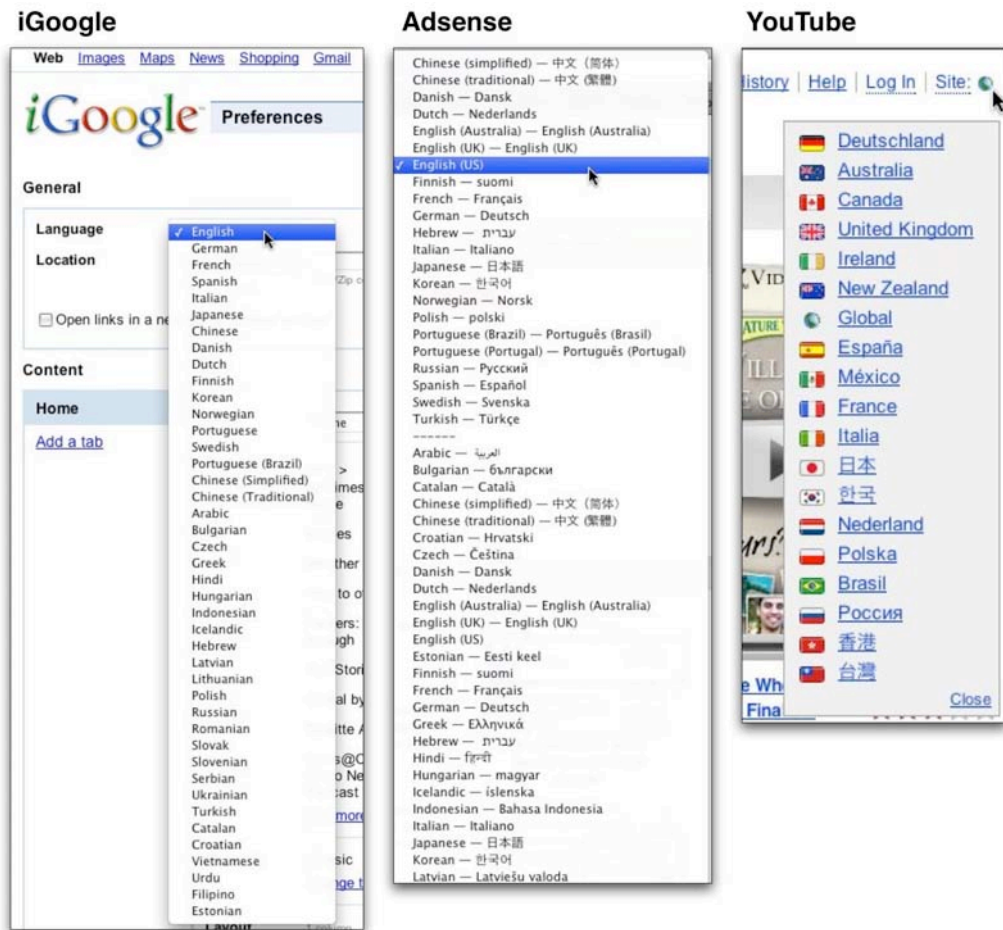
YouTube is the first Google property that we are aware of that uses a globe icon for navigation. We think the icon is a great idea and hopefully we'll see it applied to other properties. Ultimately, Google will need a global navigation strategy that Web users can rely upon to be consistent across all properties.

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The major development in this category is the strong debut of one of the Web sites added this year: **Netvibes**. Netvibes has taken a page from Google's playbook and launched impressive support for more than 50 language interfaces, relying almost entirely on volunteers.

Geolocation has become a very important element of global navigation for companies in this category, with the following 11 companies currently using it:

- Amazon
- Ask
- eFax
- Expedia
- Google
- Hotels.com
- Monster
- Netvibes
- PayPal
- Skype
- Yahoo!

Five Web sites in this category now use **language negotiation** to aid in global navigation:

- Flickr
- Google
- Netvibes
- Salesforce.com

Netvibes has joined Google in using *both* geolocation and language negotiation. Netvibes allows users to override these language and locale settings manually.

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Shown here is the settings window in a browser set with a German
language preference. Notice how *Deutsch* is checked by default.
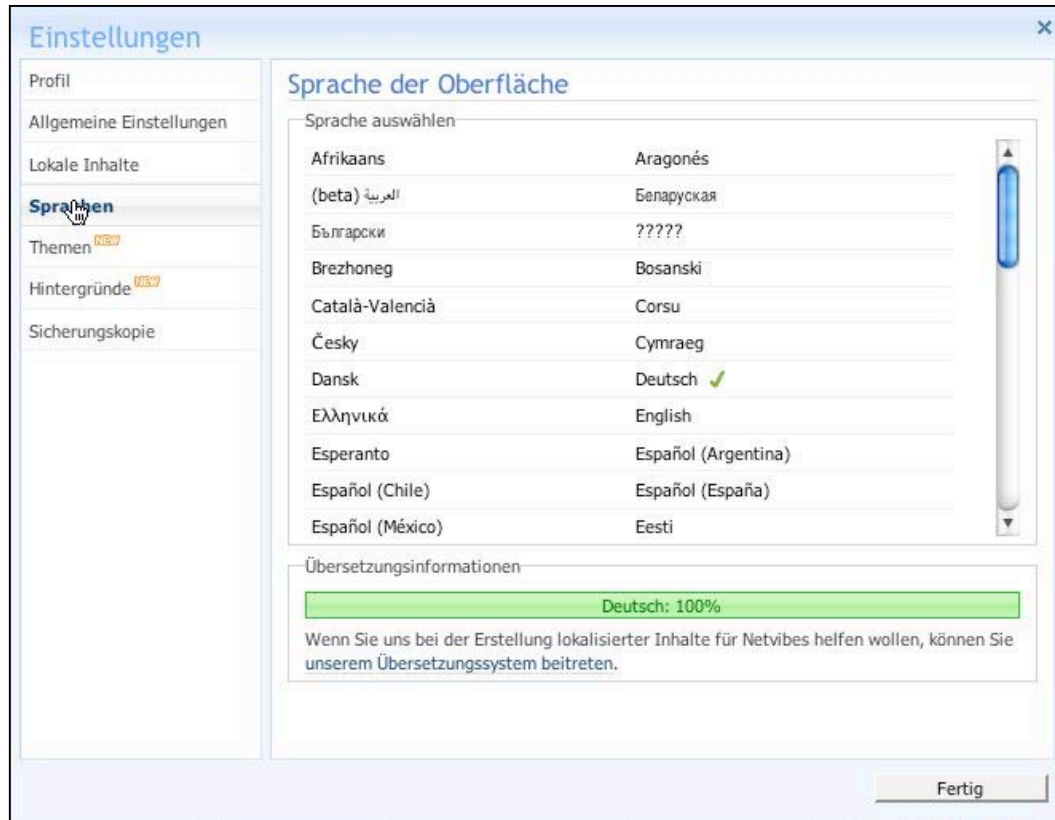
Users can also modify their location. Netvibes correctly guesses that
the Web browser is based in the US. This setting may also be
modified.
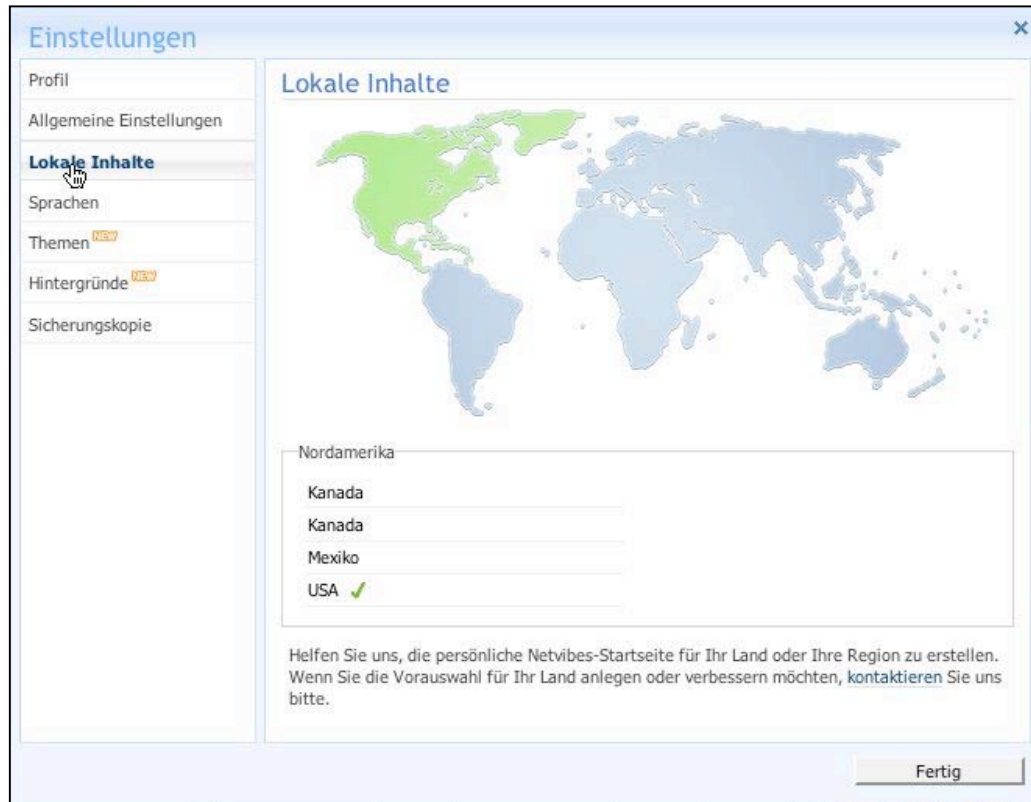
PayPal added Poland to its portfolio, bringing the number of localized sites to 14. More important, the Web site now supports a range of currencies to support transactions between 100 countries. PayPal last year added a language pull-down menu that supports four languages for the US market. Also notice on the screen shot below is a pull-down menu of countries supported by PayPal detailing exactly what services are supported within each country.
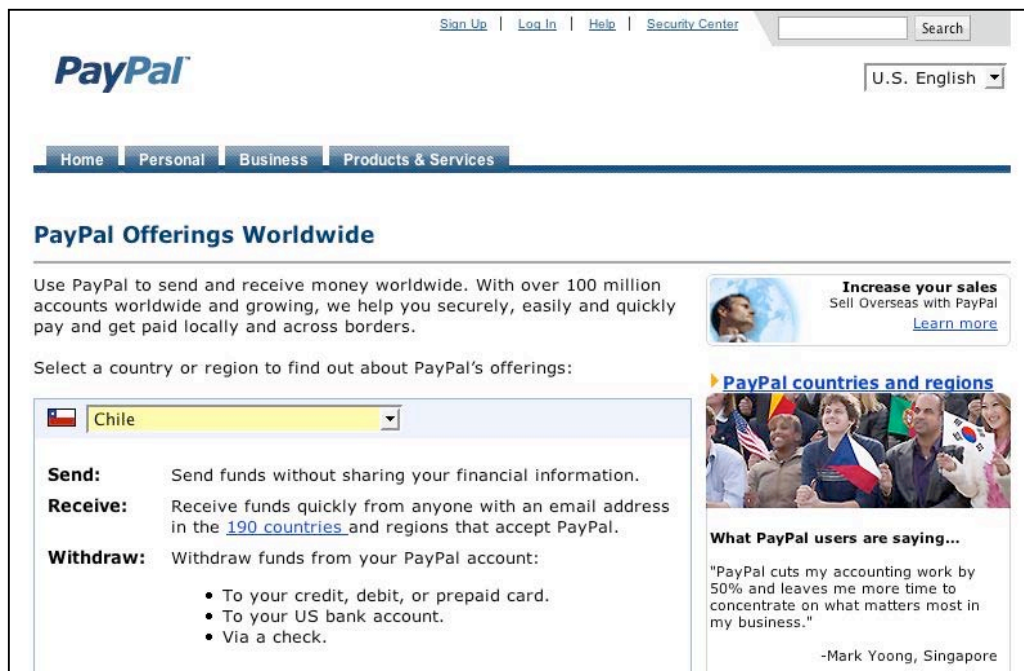
eFax offers an interesting take on the globe icon, shown below:

eFax also makes good use of both geolocation and language negotiation.

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Yahoo has a revised gateway, shown here. Unfortunately, Yahoo does not make use of geolocation or language negotiation.

AOL uses a gateway page that borrows from Yahoo!, shown here:

AOL has been very busy over the past year, doubling the number of languages it supports – from 7 to 14. AOL also now uses a consistent global design template and supports two languages within India.

Yahoo has also been busy adding languages. it now supports 31 languages, including seven languages used within India and Pakistan: Hindi, Tamil, Telugu, Gujarati, Kannada, Malayalam, Punjabi, and Urdu. Notice the language links under the search window:
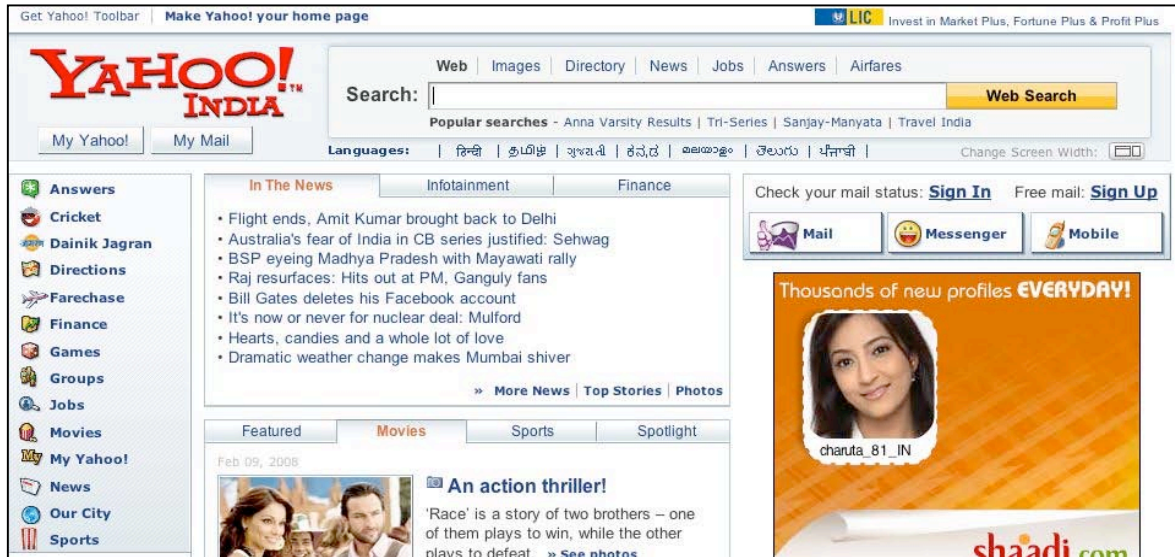
Wikipedia is the only Web site in this category that uses a splash global gateway page.

eBay added Thai and Turkish over the past year; the Web site now supports 15 languages. It also modestly improved its global gateway, shown here.

Salesforce.com reduced the number of localized Web sites it supported in 2006 but then spent last year adding localized sites once again – to a total of ten.

192
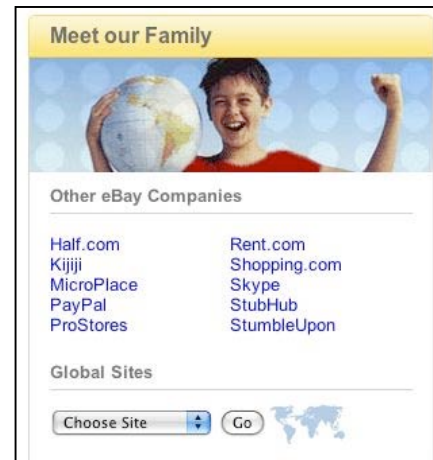
Skype changed its global gateway over the past year. Instead of using a rather complex gateway that was comprised of two pull-down menus, it now uses a permanent gateway located at the bottom of every Web page. While the positioning is not ideal, nor is the use of the pull-down menu, the fact that users can access it on any Web page is a step forward.
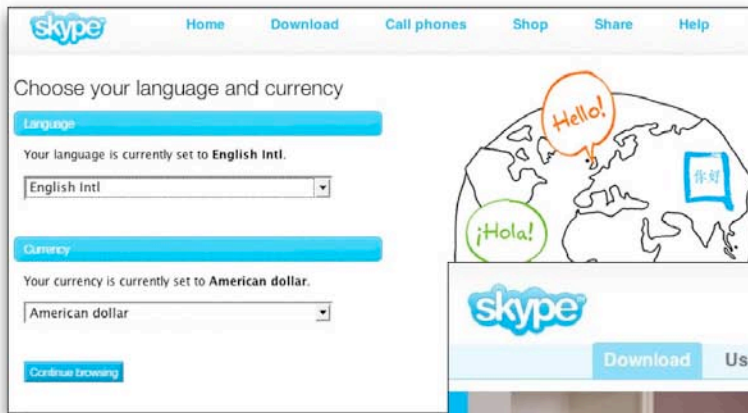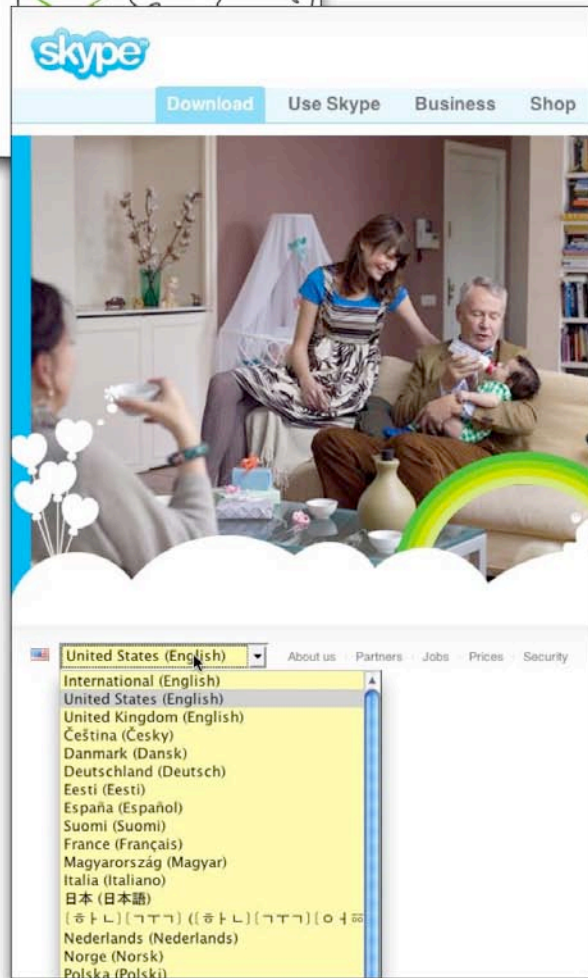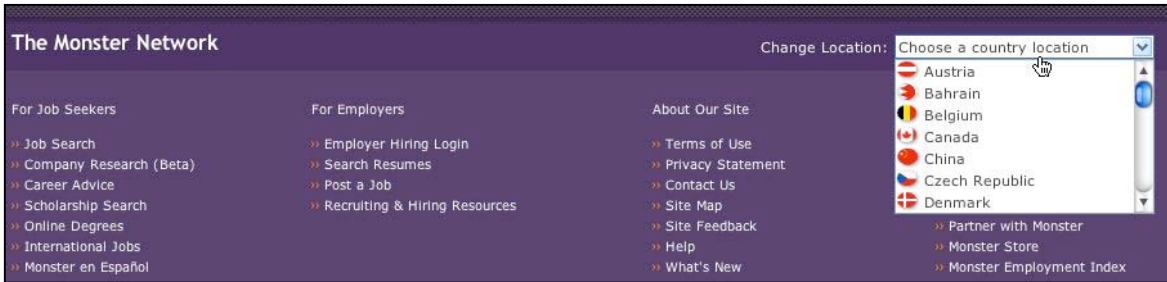

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Monster added a global gateway to its .com site. For several years, Monster has not provided any easy way for visitors to the .com site to navigate to the other country Web sites.

This gateway could be better positioned at the top of the Web page, but it is a solid step in the right direction.

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Globalization Terminology

Domain Name A unique alphanumeric text string that identifies a particular computer or domain (such as "amazon.com"). The domain name consists of two parts: the top-level domain (.com) and second-level domain (amazon). With regard to Web globalization, the top level domain is often a country code domain, such as ".mx" for Mexico or ".fr" for France.

Geolocation Geolocation is the process of identifying an Internet user's geographic location without that user having to input any data. The Web server looks at the Web user's IP address and then consults a directory to identify the location of the IP address. It is not a perfect solution, particularly for identifying where AOL users are based, but it is successful enough to be used by more and more companies.

Globalization Globalization refers to the process of adapting a business and its products to a new audience, typically one that is in a different country. "Web globalization" refers to the process of adapting a Web site for new markets; the process of Web globalization includes both internationalization and localization.

Locale A combination of language and region or country, such as French/Canada or English/UK. A number of attributes are often associated with a locale, such as number format, time and date formats, measurements, and currency.

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Language Negotiation Also known as content negotiation, it is the process of detecting a Web user's language preference and then responding with Web content in that language, if it is available. Web browsers send the language preference automatically, and may be overridden manually by the Web user. If the Web site does not have content in the user's language, the Web server may be configured to send a second language, such as English.

Localization Localization, shortened to L10N, is the process of adapting products, software, or Web sites for a specific locale. The process typically includes linguistic translation and technical and cultural modifications and adaptations. The more planning done at the internationalization stage, the easier the localization stage will be.

Machine translation (MT) The process of translating from one human language into another using software. The term originates from the days when computers were called machines. The most popular MT applications are Babel Fish (world.altavista.com) and Google Translate (translate.google.com).

Splash page An extra "first" or "front" page of a Web site, usually containing a "click-through" logo or message, announcing that you have arrived. Splash pages are increasingly being used for global gateways.

About the Author

John Yunker is co-founder of Byte Level Research and editor of the blog *Global By Design* (www.globalbydesign.com).

John consults with many of the world's largest multinational corporations, providing Web globalization training and benchmark services. Over the years, he has authored a number of reports on Web globalization, including all annual editions of *The Web Globalization Report Card*. John has spoken at industry events such as:

- IA (Information Architecture) Summit
- Internet Retailer
- Association for Language Companies
- Society for Technical Communications

John is author of *Beyond Borders: Web Globalization Strategies,* the first book devoted to the emerging field of Web globalization. Widely acclaimed, the book is used in a number of university and corporate training programs and by most of the Fortune 500.

John is a 2008 Fellow at the Society for New Communications Research.

He may be reached at jyunker@bytelevel.com or (+1) 760-317-2001.

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A Whole New Way of Looking at the World
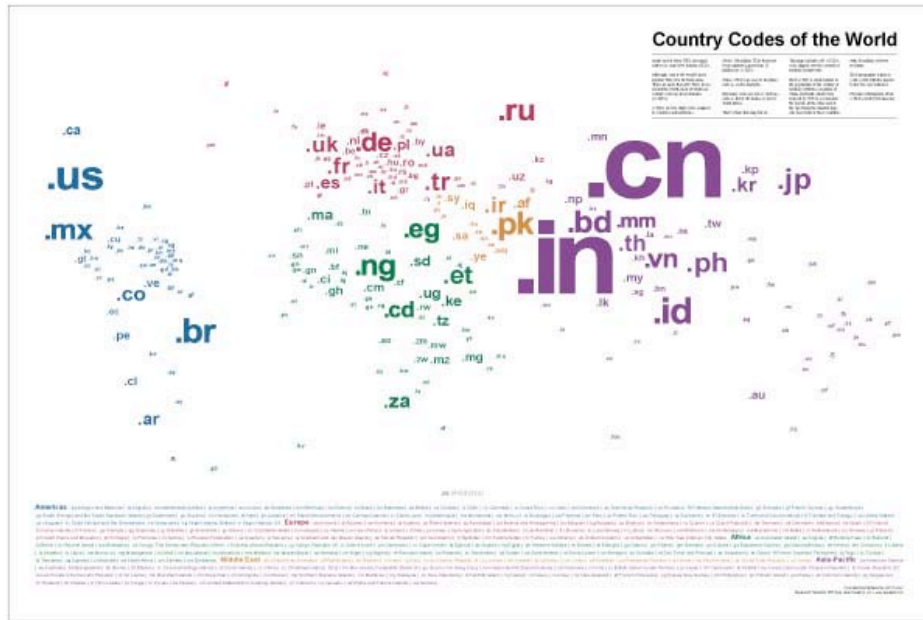
Every country has its own two-letter code, such as .de for Germany and .cn for China. But not all codes are so obvious, such as .lk for Sri Lanka or .za for South Africa.

That's where this map comes in handy.

The Byte Level Map of the WWW includes all 245 county codes currently in use, covering all United Nations countries. Each two-digit code is aligned over the country it represents. And each world region is color coded with the legend below for quick and easy reference.

For more information, visit: www.bytelevel.com/map/ccTLD.