CSA Research

Methodology:
Global Market Study

*Process for CSA Research's Annual Study
of the Language Services and
Technology Market*

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Overview

CSA Research publishes an annual series of reports on the language services and technology market based on our yearly comprehensive survey of language service and technology providers. Learning about the science behind this research series will help you understand the strict methodology we use to conduct the survey, validate the data, analyze it, and draft the reports.

What This Report Covers

This report describes the survey methodology for CSA Research's annual survey of language service and technology providers.

In this report, we explain: 1) the basics of the survey logistics; 2) our data cleansing approach; and 3) the methodology that underpins the rankings.

Why It Matters

Our annual project deeply benefits language service and technology providers by providing actionable data they can use in their planning. Buyers of their services, whether enterprises or governmental agencies, use our data and insights to educate themselves on the market. Investors and the media also rely on this data to frame the sector and evaluate its potential.

Without the depth of analysis that we produce from the survey, several things would happen. Mainstream media would focus their reportage on translation mistakes, translation gadgets, or litigation. Buyers would not understand the intricacies of this complex outsourced business process. Private equity groups would invest elsewhere. And language service and technology providers around the world would have a tough time evolving their industry.

Our annual report is based on a rigorous methodology that ensures the accuracy and integrity of the data we present. Instead of estimating values, we present the exact data provided and verified by LSPs, GCSPs, and technology vendors for our rankings. LSPs, GCSPs, buyers, and investors that use the reports based on our methodology can be confident in trusting our findings and analysis.

Related Research

- "Listing of Global and Regional LSPs (2025)"
- "2025 Data on 116 Global and Regional LSPs"
- "CSA Research's Multiyear Dashboard of Global and Regional LSPs"

Survey Basics

Since 2004, CSA Research has conducted its annual study of the state of the language services and solutions market to take its pulse and forecast its growth. Our annual market study also includes industry rankings of providers and market sizing. Starting in 2026, the survey has been restructured to be simpler and to focus on emerging "nontraditional" global content and language offerings.

We conduct this survey online with vendors for service, solutions, and technology for global content and language. We ask a series of questions regarding company size, revenue, service mix, and other characteristics. Respondents choose whether they want to participate in a ranking of the largest providers. If you do not find specific vendors in the results, it is likely that they chose not to be considered for ranking, or they might have provided data but not for publication.

Since 2020, we have also released the survey in Chinese in order to capture answers from otherwise hard-to-reach providers. This better equalizes the geographic distribution of the survey.

Our analysis and data teams collaborate to design and test this comprehensive survey with two objectives in mind: 1) to obtain financial and other company data from a valid representative sample of companies so that we can compare it against the total population; and 2) to identify the largest providers in each region and category.

Survey Targets

We target two types of companies with our annual market survey (Figure 1):

- **Language service providers (LSPs) and global content solutions providers (GCSPs).** CSA Research defines these providers as companies that offer services, solutions, and/or technology related to the transfer of spoken, written, and multimedia information from one language into another. To qualify as a provider under our definition, companies must have two or more full-time employees, a minimum level of revenue that varies by country, and visible market activity. Many of those that we exclude are more properly categorized as freelancers, contractors, or less than full-time businesses.

- **Independent software vendors (ISVs).** These companies develop, market, and sell technology that supports both demand-side users such as enterprises and governments as well as supply-side providers and freelancers. Their products include translation memory and terminology tools, machine translation, interpreting management systems, and a variety of other language processing software. Language-centric ISVs that respond to our survey meet the same minimum-size criteria as LSPs.

Figure 1: How CSA Research Surveys the Market
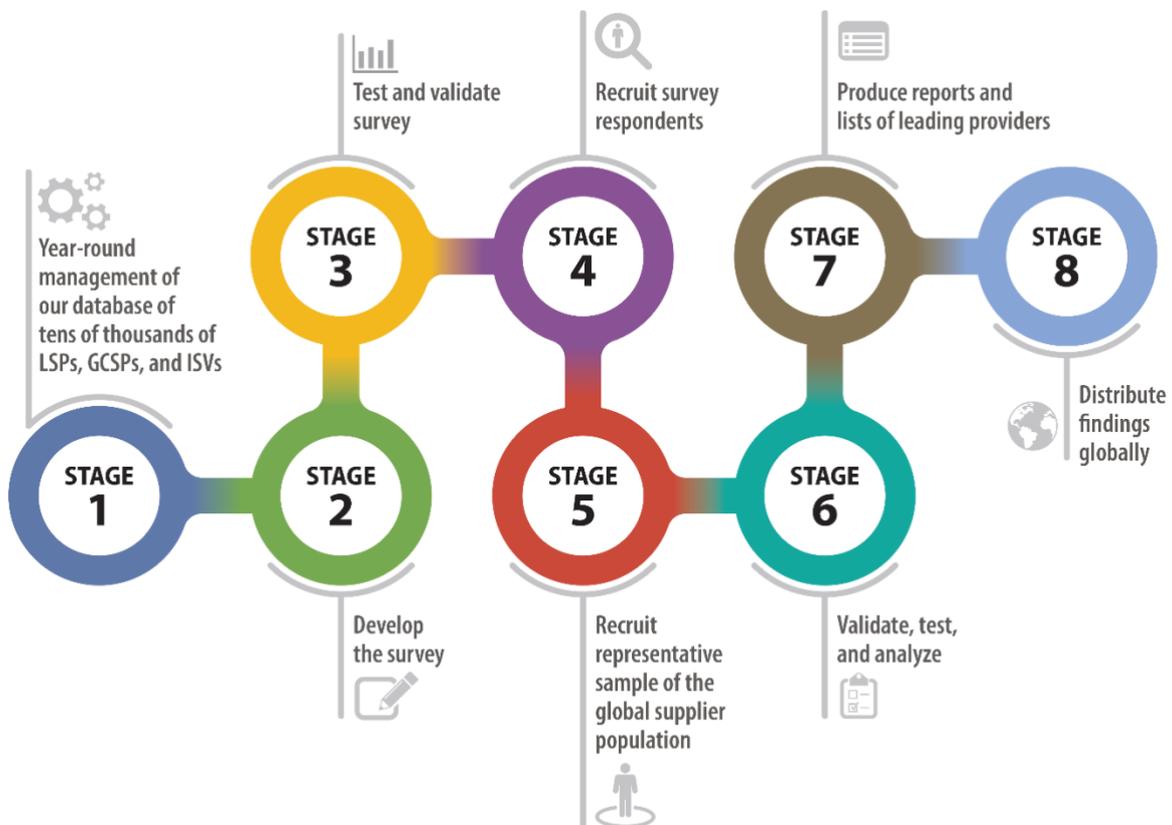
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Number of Responses

CSA Research follows statistical best practices to determine the number of respondents required to achieve a representative sample. The formula considers population size and confidence level in the data. We strive for a confidence level of 95% or above to provide reliable data and insights. The number of respondents that we report every year

represents only valid responses. We exclude respondents that did not complete the survey or that we eliminated due to data that did not pass CSA Research validation tests.

Survey Participation

Taking the survey is voluntary for privately held firms. We consider them for ranking only if they take the survey. We do not use national business filings for such providers. For public companies that do not take the survey, we use only official regulatory filings to rank them. Our recruitment approach entails:

- **Email invitations.** We continuously maintain a database of tens of thousands of providers and ISVs. Each year, we reach out to main contacts at these companies to invite them to participate in the survey. We supplement emails with phone calls as needed. We also mention the survey to qualified audiences at speaking engagements during the recruitment period.

- **Incentives.** To encourage LSPs, GCSPs and ISVs to participate, all respondents who complete the survey receive CSA Research reports, including a benchmarking report that enables them to see how they compare to their global and regional peers as well as companies of similar size. This report provides data and insights that are useful in business planning and operations.

Survey Process

Since we launched the current survey model in 2010, we have developed and refined guidelines for handling questions, problems, data security, privacy concerns, and duplicate entries throughout the survey period. Three highlights of our approach are:

- **Survey anonymity.** We treat any information collected through the main path of the survey in a fully anonymized fashion. We use it only in aggregate format. Data collected when companies choose to apply for a ranking includes a selection of datapoints that we make public if, and only if, the company both qualifies for a ranking and has approved the use of the data. We do not publish data without the company's express approval except for publicly traded companies where we collect data from their corporate filings.

Note: Publicly traded companies report their results according to their fiscal year (FY) accounting, which is often not synchronous with the calendar year. There are many variants, so, using calendar year 2025, a fiscal year could have started as early as July 2024 or as late as June 2025. As a result, the stated revenue and other financial results may not correspond to other statements from or about a given company that assumes a different basis.

- **Corrections.** In the case of a mistake when taking the survey, we direct the company to fix the error or let them start over with a new survey response. Our research team also makes numerous requests for clarifications, especially in cases when a company provides conflicting responses about its operations or where answers appear questionable, such as instances in which revenue for a year looks like it is off by a factor of 10.

- **Three main paths.** Some companies complete the survey to share their data and appear in a ranking, others give us details but do not authorize us to publish them for a variety of business, competitive, or regulatory reasons. Others provide additional details that enable us to determine if they qualify for specialized rankings.

Data Cleansing

Each year, we reject or disqualify hundreds of responses if the respondent did not finish the survey, their responses did not fit our criteria, or they provided duplicate data.

The value of the data we collect and the aggregated information and analysis that we produce depends on the quality of two elements: 1) our supplier database; and 2) the survey data.

Ongoing Database Maintenance

Over the years, CSA Research has expanded its database to develop the most comprehensive listing of language service and technology providers in the world. We update this supplier database on an ongoing basis with LSPs, GCSPs and ISVs as they come into being, evolve, are acquired, or go out of business. Over the last few years, we extended this database by harvesting LSPs, GCSPs and ISVs from a variety of sources, including in-depth searches by service and location.

This data is vital to calculate market size as we compare the results of our annual representative sample to the overall LSP, GCSP and ISV population based on clusters of companies that share a similar profile.

Survey Data Scrubbing and Normalization

To ensure accurate metrics and market sizing, we conduct an array of datapoint verifications on each survey answer (Table 1). We involve the entire research team in validating information related to each analyst's area of expertise.

- **Duplicate removal.** We ensure that we have only one response for each company. If we receive multiple entries, we collaborate with respondents to identify which entry to retain.

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

Table 1: Sample Validation Performed on Ranking Candidates

Sample Check	Description
Number of employees compared with actual revenue	We check the number of employees against the actual revenue to ensure that the revenue-per-employee ratios and staffing levels do not fall outside industry norms. This check helps us find companies that inadvertently entered incorrect data.
Growth over previous years	We calculate providers growth rates over previous years to find potential data entry errors. We contact the company in cases of atypical growth rates.

Source: CSA Research

- **Outlier review.** We rely on a variety of statistical calculations and data visualizations to flag out-of-bounds answers for every single quantitative question in the survey. We systematically review minimum and maximum values, average results, medians, frequencies, standard deviations, and data ranges. We conduct independent research on companies and contact them when we find questionable elements. We find that many of the issues result from respondents' typographic errors that we fix upon receiving their correct answer.

- **Year-over-year comparison.** We compare responses to the prior year for those that had previously taken the survey to ensure consistency in the answers. In cases of discrepancies and significant changes in their data from previous years, we contact the respondents.

- **Correlations.** We run hundreds of correlations every year by comparing distinct datapoints that typically evolve along known patterns. We use these to further identify outliers and questionable data. We narrow down the questionable element, request verification from the respondent, and eliminate unconfirmed datapoints.

- **Final validation of rankings.** Data published in rankings goes through a required secondary verification by ranking candidates. We email each company contact the record for its entry – without revealing its position in the ranking. We list the exact information we intend to publish in the ranking. We ask them to review each piece of information for accuracy before publication. This extra step gives respondents who provide financial data an opportunity to review and correct any mistakes.

Answer Clarification

The top company executives or their surrogates typically respond to the survey.
We require all providers to provide truthful and accurate information.

When we identify an issue such as a discrepancy with industry norms, we contact the company for clarification. Annually, our research team completes hundreds of such data verification calls. These checks flag any suspicious element that a company has not verified and initiate an inquiry and verification.

Of course, a company may inadvertently provide inaccurate data, and over time we have determined and eliminated a few instances of deliberate misinformation. None of these have affected the market sizing and segmentation. If we do find an error in a published ranking − whatever the cause − we immediately post a correction as an attachment to the report.

The Methodology That Underpins the Rankings

CSA Research confidentially surveys suppliers for their financial and business details that we aggregate and analyze for our annual series of data-based reports. The strength of our research relies on the methodology we use to produce it.

Survey respondents can apply for inclusion in our annual rankings of the largest suppliers in the world or in one of the geographic regions defined by the United Nations. Taking the survey is the only way a company can qualify to appear in our rankings, except for publicly traded companies that publish detailed financial data. Ranking candidates go through a validation process to ensure the highest quality possible in the data we publish (Figure 2).

Figure 2: The CSA Research Ranking Validation Process
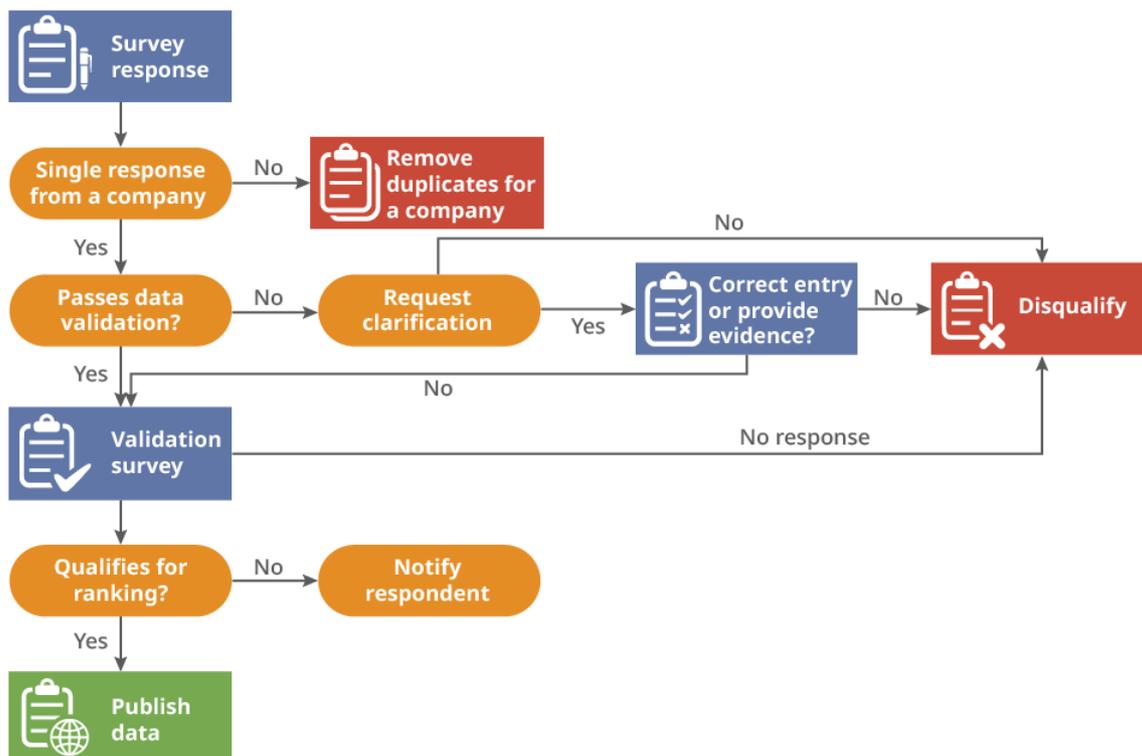
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How We Manage Special Ownership Scenarios

We developed policies to handle various ownership types to avoid possible duplication of LSPs and GCSPs with in-country, technology, or specialty service subsidiaries and misrepresentation of companies that should not appear in rankings (Table 2).

How Companies Avoid Notice

While we make every attempt to identify the biggest suppliers in the world and within each region, we highlight several important caveats:

- **Some companies do not want to share their data.** As the results of our survey show, most translation and interpreting businesses are privately held. As such, they may be reluctant to disclose their financial information. In some cases, the fact that our rankings are widely cited and referenced is sufficient to make them change their minds. However, some companies complete the annual survey with their exact revenue, but still choose not to be publicly ranked.

- **Some firms participate inconsistently.** When a provider performs poorly in a given year, it may decide not to broadcast this information to the world, even if it appeared in previous rankings. Or if the company changes its management, ownership or how it reports its revenue, it may choose to reconsider its participation in our study – and thus not appear in the rankings.

- **Even public companies do not share everything.** We publish estimates for some publicly traded companies based on their officially disclosed information. However, even public filing statements do not always provide the level of information that we require. For example, a firm may divulge revenue information for a single service or business unit, but this figure may not represent the total volume of language services provided across the entire organization.

- **The survey is in English and Chinese.** The survey language is a problem for some companies. However, the number of countries represented in the survey stands in the way of translating it to give all respondents anywhere in the world a local, mother-tongue experience. As a move in that direction, we use a Chinese version of the survey to increase response counts from China.

Table 2: Policies Regarding Special Ownership Scenarios

Ownership Type	Scenario	Policy
Subsidiaries	If the parent company derives 50% or more of its total revenue from language services activities …	We consider the parent company to be a provider, and we report their revenue derived from language services.
	If the parent company derives less than 50% of its total revenue from language services activities …	We treat the subsidiary – rather than the parent corporation – to be a provider, and we report their revenue.
Business units and divisions	If the parent company has only one division or business unit that provides language services …	A business unit or division may apply individually to be included in a global or regional ranking.
	If the parent company has two or more divisions or business units that provide language services and wishes to participate in the ranking …	The parent company must consolidate the revenue for all such divisions or units to appear in a global or regional ranking.
Collectives	If a collective entity consists of companies that derive 50% or more of their total revenue from language services activities …	We direct constituent companies to participate individually, so that each member company may reflect its share of revenue.
	If the companies that make up the collective entity do not derive 50% or more of their total revenue from language services activities …	They may elect to either allow each owner/shareholder to participate separately or the collective entity may participate instead.
Joint ventures	If a company is the result of a joint venture …	Either the collective entity or the individual entities may participate, but not both.
	If both an individual entity and a collective entity attempt to participate …	We contact all parties involved for the companies to determine how the revenue should be reflected without duplication.

Source: CSA Research