



*The* **2013**

# **Web Globalization Report Card**

**Benchmarking 150  
global websites  
*including*  
mobile & social best practices**

**bytelevel** / *research*

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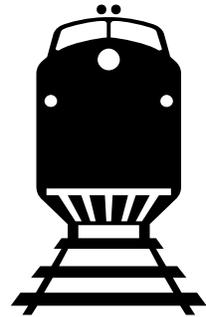
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# Web Globalization Is Destiny

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It has often been said that demographics is destiny.

That is, population shifts force countries and companies to adapt or risk being left behind. In the United States, for example, the rapid growth in the Hispanic population has transformed politics and culture and has given rise to new businesses.



Like a fast-moving train, demographics carry with them a sense of inevitability. You either get on the train or get out of its way.

The same might be said of web globalization. There is an inevitability to Internet growth and the languages and cultures of the next billion Internet users. Right now, more than 2.5 billion people are online—most of whom are not native-English speakers. As for the next billion Internet users, most will live in Eastern Europe and Asia, and few will be native-English speakers.

If you get on the web globalization train, you position your company to connect with the world. If you ignore web globalization, you risk getting left behind.

## **Nine years of benchmarking websites**

This is the ninth edition of the *Web Globalization Report Card*. Each year we try to “raise the bar” in how we score websites—not just to keep pace with the evolution of global sites but to push the industry forward. This year, we awarded extra points to those companies that demonstrated progress on the localization not only of their PC websites but also their mobile websites.

We benchmarked 150 websites across more than a dozen industry categories. These sites comprise more than 70% of the companies on the Interbrand Best Global Brands 2012 list and 30% of the Fortune 100, ensuring a broad reach of global brands and businesses.

### **A global look at mobile websites and apps**

This is the second *Report Card* to review websites not only on a PC but on an iPhone and an iPad—all from a uniquely global perspective. Our aim is to note what companies are doing across these platforms—from languages supported to global navigation.



I must stress that best practices are only just emerging—many of the mobile websites are first-generation sites, and some apps still wear the “beta” label. But that’s why it’s important to begin including mobile developments in our benchmarking now—to get a solid understanding of which companies are off to a head start and where they are headed.

One key best practice we look for are mobile sites and apps that maintain language parity with their PC counterparts. It’s important that users be able to enjoy the same linguistic experience as they move from platform to platform. And we also believe that Flash-based elements should be removed from websites so that websites can be viewed in full across all mobile devices.

### **How to use the *Web Globalization Report Card***

This report serves two purposes. First, it calls attention to those websites that have excelled in the practice of web globalization. The companies that have made the top 25 did not get there by accident. We have, over the years, interviewed a number of people at these companies and have witnessed the obstacles many of these executives face in raising budget levels and implementing localization standards across the many regional and country offices. The executives who have helped get their websites into the top 25 list deserve recognition for

helping their companies communicate effectively with the world, regardless of language, culture, or geography.

Second, this report identifies emerging trends (both positive and negative) to help you avoid the painful missteps that others have already taken. This report is designed to help you guide your web, marketing, and mobile teams to positive, efficient action.

Never before have companies been expected to support so much content across so many languages and across so many devices. And while this is a very exciting time to be involved in web globalization, it's also quite challenging. I hope you find this report valuable, and I hope you contact me with any comments or questions along the way.

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# The Top 25 Global Websites

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For the *2013 Web Globalization Report Card*, we analyzed 150 global websites across 15 industry categories.

To the right are the top 25 websites overall.

Google retains the top spot with Facebook slipping slightly and Hotels.com making a strong run. Google, due in large part to its ongoing struggle to harmonize its global navigation across its many applications, lost points this year but still retained the lead. Facebook lost ground largely because of continued lack of localized help content—something the website has been promising to fill out for two years now.

Philips improved its ranking due to its improved global gateway. And Microsoft and HP also saw gains due to their website redesigns, which included improved global gateways.

As a group, the top 25 websites support an average of 50 languages. They also demonstrate a high degree of global design consistency across most, if not all, localized websites. This degree of consistency allows them to focus their energies on content localization, which these companies also do well. And more than 20 of these companies support websites optimized for smartphones.

## Best Global Websites 2013

1. Google
2. Hotels.com
3. Facebook
4. Cisco Systems
5. 3M
6. Philips
7. Booking.com
8. Samsung
9. Twitter
10. NIVEA
11. Microsoft
12. Kayak
13. HP
14. Starbucks
15. Wikipedia
16. Yahoo!
17. LG
18. Autodesk
19. Intel
20. American Express
21. Merck
22. Adobe
23. KLM
24. Deloitte
25. KPMG

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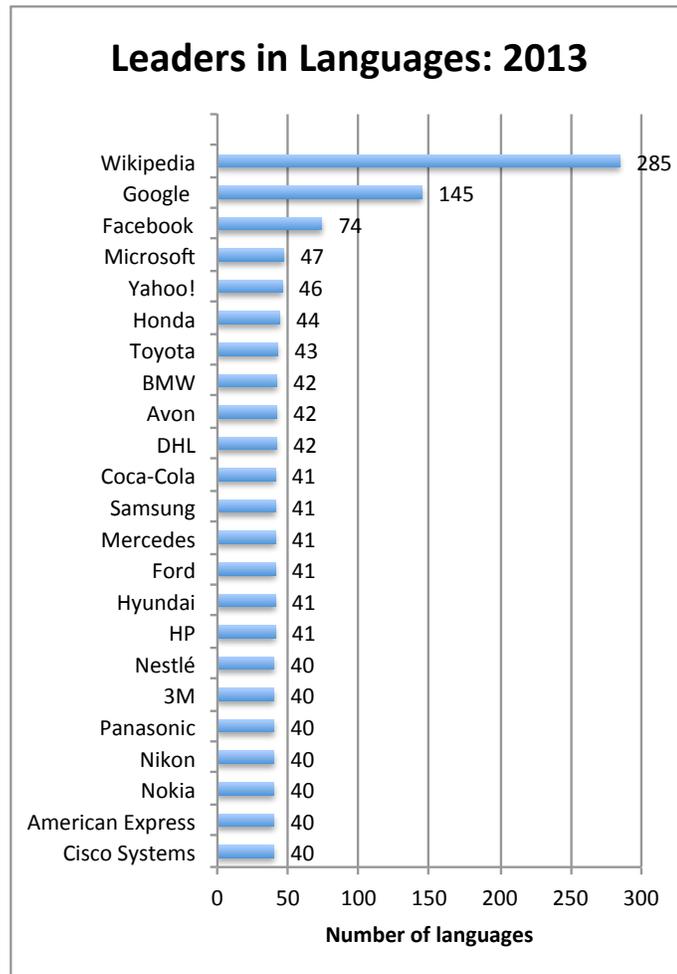
The travel sector is well represented on this list, and that's due to innovations in mobile websites and apps. Any company that is developing a mobile strategy should study Hotels.com, Kayak, and Booking.com.

Simply supporting a large number of languages isn't enough to make it into the top 25. To make it into the top 25, a website must excel across these four key criteria:

- **Global Reach** (the more languages supported, the greater the global reach)
- **Global Navigation** (ensuring users can easily find local content)
- **Global/Mobile Architecture** (global consistency—across different locales as well as browsers and mobile devices)
- **Localization & Social** (depth and breadth of localization and support for local-language social networks)

# 1. The leading global websites support 40 or more languages

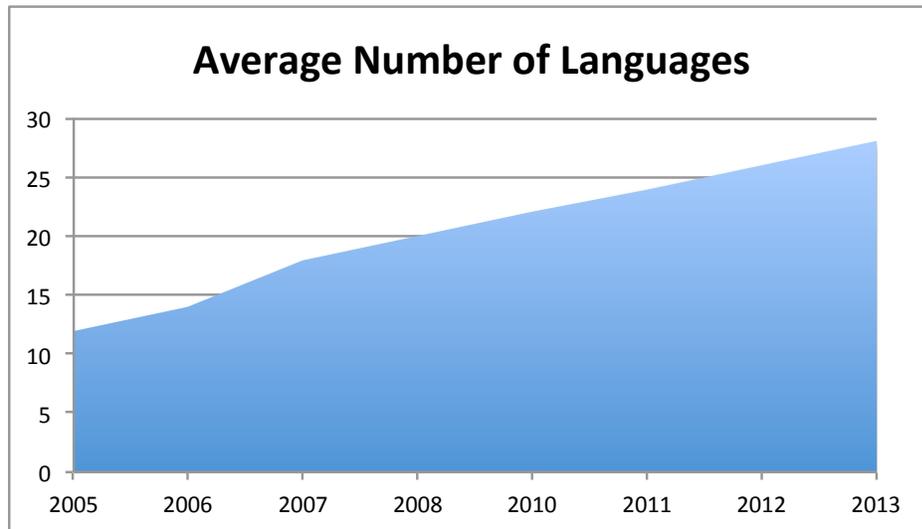
While language alone does not make a website successful globally, it's a prerequisite to going global. Of the 150 websites studied, below are the language leaders overall. Note that English for the US is not included in our counts.



It's worth noting that Facebook appears poised to overtake Google in the language category in 2013, which we explain in the Web Services category in Part IV.

### Average number of languages supported increases to 28

Keeping in mind that this number is based on the 150 companies selected—and would naturally decrease as our sample size increased—the number is still significant.



### Slow and steady web globalization

We have tracked more than half of the websites included in this report for five or more years. In doing so we understand how companies tend to expand their geographic and linguistic reach.

Consider the following examples of language growth:

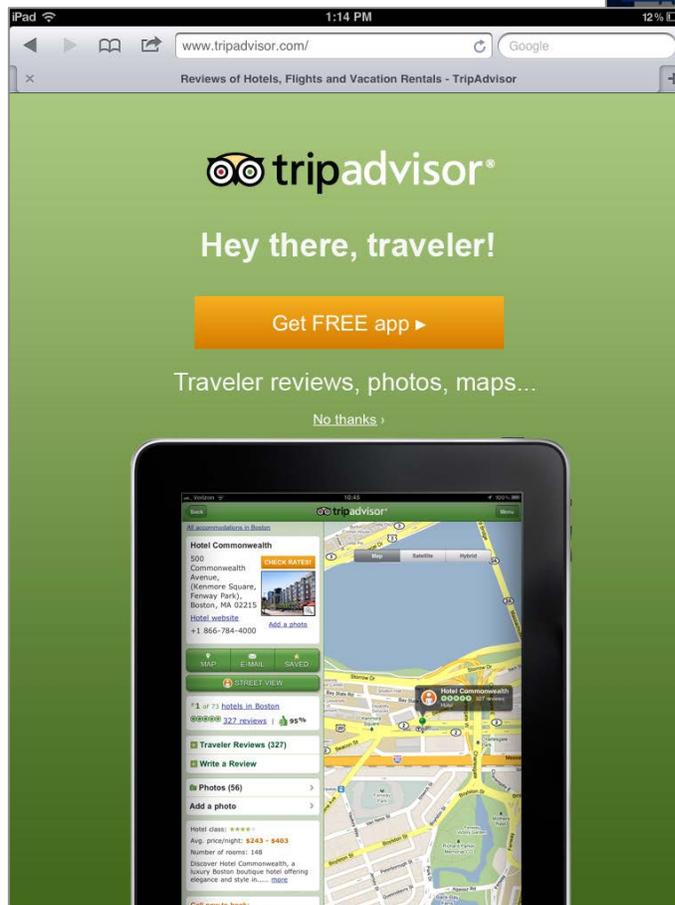
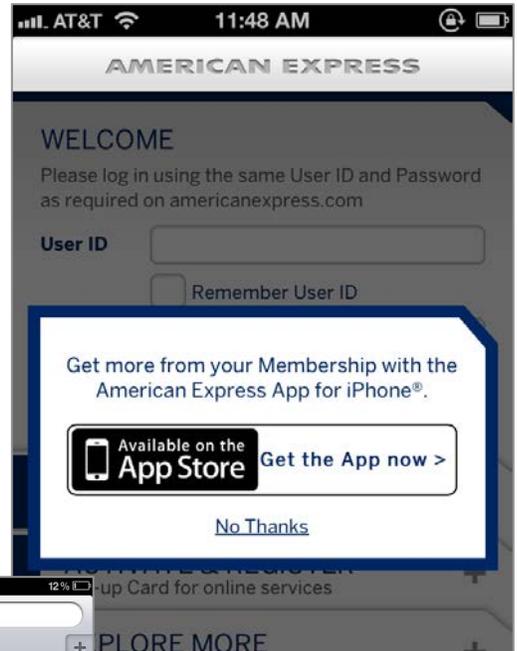
- **VW** supported 31 languages in 2008; today it supports 39 languages.
- **Nikon** supported 21 languages in 2008 and now supports 39 languages.
- **Starbucks** supported 11 languages in 2007; today it supports 22 languages.
- **Symantec** has grown from 7 languages in 2007 to 27 languages today.

## 2. Pushing apps

Companies are increasingly investing in mobile apps for smartphones and tablets.

Naturally, they want to let people know these apps are available. On the right, American Express displays an overlay promoting the app.

Below, TripAdvisor, on the iPad, displays an entire web page promoting the app.



But what if you offer an app that supports a number of languages? The key then is to make sure that, for example, Spanish web users get a message in Spanish.

A few companies are smartly doing just that, such as Twitter.

Shown here is what a web user with an iPhone set to Spanish sees upon visiting Twitter. In this case, the website, leveraging language negotiation, greets the user with a Spanish-language home page. And the iPhone, detecting that the Twitter app has been installed, provides a Spanish-language “open” banner.



## 3M

3M leads the diversified companies category with support for an impressive 40 languages. Companies in this sector face the particularly daunting task of managing many brand websites across many geographies. And few companies support such a diverse range of brands as 3M. But the company has done a very good job over the past few years of harmonizing global design templates.



Notice how three distinct brands share a common template.

3M supports an effective global gateway, shown here:



More important, 3M includes a link to this page on its numerous country websites. The global gateway link also includes a map image, which is extremely valuable to users who may not speak the default language.



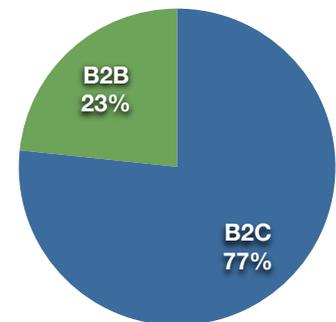
As shown on the Israel home page, it's easy to find the global gateway: For its mobile website, 3M uses geolocation to automatically take users to the local websites. It would be nice to see geolocation (and language negotiation) used for the PC website as well, bypassing this gateway.

## How Websites Were Selected

We included a wide range of industries in our analysis to provide an encompassing understanding of the state of the global Internet—and to identify best practices within one industry that may be of value to other industries. Here are the industry categories and the number of companies included within each.

Industry	Companies
Travel & Hospitality	25
Consumer Technology	18
Consumer Goods	15
Automotive	14
Retail	12
Diversified	12
Enterprise Technology	12
Web Services/eCommerce	9
Travel Services	7
Financial Services	7
Professional Services	6
Medical/Pharma	5
Delivery	4
Non-profit	3
Media	1

Please note that some companies easily span multiple industry types and that we limit a company or brand to just one category. Overall, more than 75% of the companies are focused largely on consumers, while the rest are focused on businesses.



Within each industry, we included the leading companies with a focus on brand leadership. We included more than 30% of Fortune 100 companies and more than 70% of the [Interbrand Best Global Brands 2012](#).

## The Websites

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

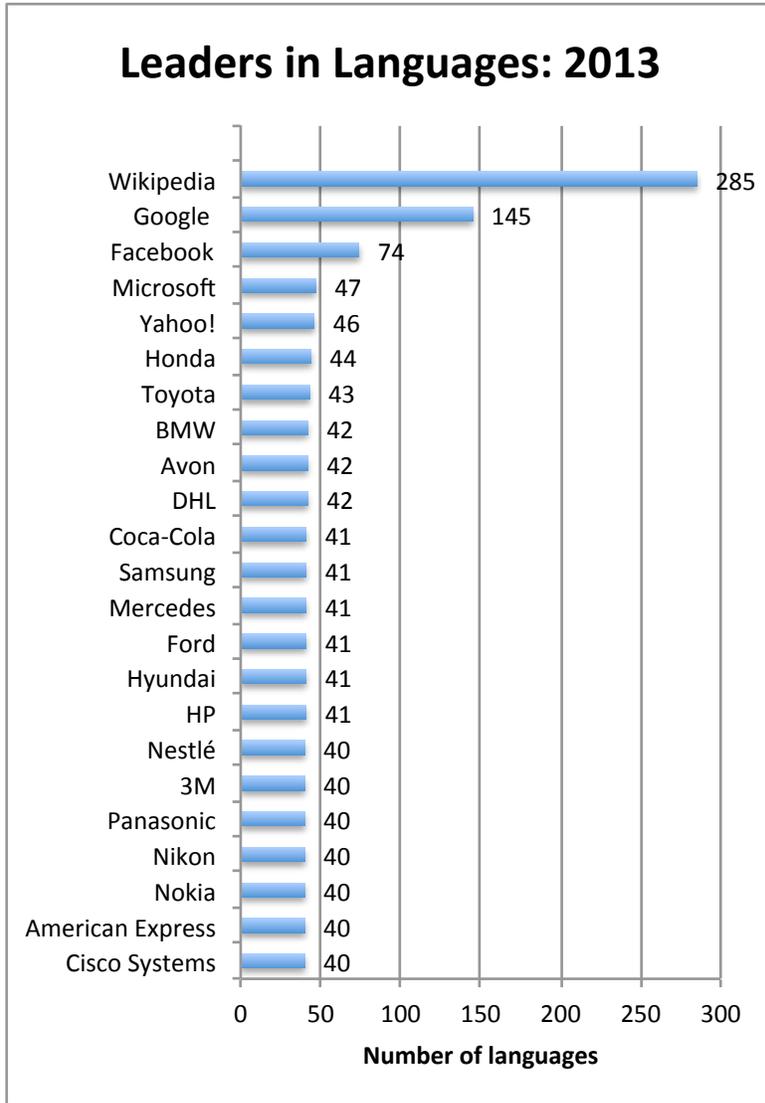
1. 3M
2. Accenture
3. Accor Hotels
4. Acer
5. Adidas
6. Adobe
7. Air France
8. Allianz
9. Amazon
10. American Airlines
11. American Express
12. Amway
13. Apple
14. Audi
15. Autodesk
16. Avis
17. Avon
18. Bayer
19. Best Buy
20. Best Western
21. BMW
22. Booking.com
23. British Airways
24. Canon
25. Capgemini
26. Caterpillar
27. Chevrolet
28. Cisco Systems
29. Citibank
30. Coca-Cola
31. Costco
32. Dell
33. Deloitte Touche Tohmatsu
34. Delta
35. DHL
36. Disney
37. Dolby
38. Dollar Rent A Car
39. Dyson
40. eBay
41. Eli Lilly
42. EMC
43. Emirates
44. Enterprise
45. Ernst & Young
46. Expedia
47. Facebook
48. FedEx
49. Ford
50. Four Seasons
51. GameStop
52. Gap

- |                             |                             |
|-----------------------------|-----------------------------|
| 53. GE                      | 85. Marriott                |
| 54. Gillette                | 86. Marsh                   |
| 55. Goodyear                | 87. McAfee                  |
| 56. Google                  | 88. McDonald's              |
| 57. H&M                     | 89. Mercedes                |
| 58. Heineken                | 90. Merck                   |
| 59. Hertz                   | 91. Michelin                |
| 60. Hilton                  | 92. Microsoft               |
| 61. Hitachi                 | 93. Mini                    |
| 62. Honda                   | 94. MSC Cruises             |
| 63. Honeywell               | 95. MTV                     |
| 64. Hotels.com              | 96. Nestlé                  |
| 65. HP                      | 97. NetApp                  |
| 66. HSBC                    | 98. Netflix                 |
| 67. HTC                     | 99. Nike                    |
| 68. Hyatt                   | 100. Nikon                  |
| 69. Hyundai                 | 101. Nissan                 |
| 70. IBM                     | 102. NIVEA                  |
| 71. IKEA                    | 103. Nokia                  |
| 72. Intel                   | 104. Oracle                 |
| 73. InterContinental Hotels | 105. Panasonic              |
| 74. Jack Daniels            | 106. PayPal                 |
| 75. John Deere              | 107. Pepsi                  |
| 76. Kayak                   | 108. Pfizer                 |
| 77. Khan Academy            | 109. Philips                |
| 78. KLM                     | 110. PricewaterhouseCoopers |
| 79. KPMG                    | 111. Procter & Gamble       |
| 80. Kyocera                 | 112. Radisson               |
| 81. Lenovo                  | 113. Ramada                 |
| 82. Lexus                   | 114. Reebok                 |
| 83. LG                      | 115. Renesas                |
| 84. Loréal                  | 116. Royal Caribbean        |

- |                        |                      |
|------------------------|----------------------|
| 117. Ryanair           | 134. Toys R Us       |
| 118. Samsung           | 135. Travelocity     |
| 119. Sanofi            | 136. TripAdvisor     |
| 120. SAP               | 137. Twitter         |
| 121. Siemens           | 138. UNIQLO          |
| 122. Sixt              | 139. United Airlines |
| 123. Sony              | 140. UPS             |
| 124. Staples           | 141. Visa            |
| 125. Starbucks         | 142. Volkswagen      |
| 126. Starwood Hotels   | 143. Volvo Group     |
| 127. Steelcase         | 144. WalMart         |
| 128. Symantec          | 145. Western Union   |
| 129. Texas Instruments | 146. Wikipedia       |
| 130. Thrifty           | 147. World Bank      |
| 131. TNT               | 148. Xerox           |
| 132. Toshiba           | 149. Yahoo!          |
| 133. Toyota            | 150. Yelp            |

# Languages: How Many?

Although Wikipedia, Google, and Facebook are by far the leaders in languages, most global companies are content to reach 40 languages. Shown here are the leading companies overall sorted by the number of languages they support.



# Wave Flags Carefully

Flags are among the most well-known visual icons for a given region or country, so it's little surprise that companies often use them on their websites. In fact, the past year saw a surge in companies using flags, often mistakenly. Here are three rules to keep in mind:

## Rule 1: Never use flags to denote language.

Just don't do it. Flags may be used to denote a country or region, but they are not synonymous with language. For instance, what flag would you use to denote Spanish?

## Rule 2: Avoid politically sensitive flags.

The biggest reason to avoid using flags is to avoid any potential geopolitical issues. For example, many Chinese citizens are offended when they see Taiwan's flag displayed on a website. This is likely the reason why that flag is so obviously absent from the Accenture global gateway:



## Taking Social Global

Over the past two years, companies have firmly embraced social platforms such as Twitter and Facebook. But only a few companies have embraced these platforms on a global basis. Starbucks is one such company.



Starbucks has more than 35 million followers on Facebook. But this isn't what is most impressive about Starbucks' efforts on Facebook. What's more important is the company's support for local Facebook pages.

Starbucks manages 36 local Facebook pages—from Brazil to Taiwan to Greece.

Although the number of followers on these pages are nowhere near 35 million, the level of engagement is



arguably much greater because Starbucks interacts with customers in the local language, promoting geographic-specific coupons and local events.

To help people find the local Facebook pages, Starbucks provides a global gateway on its primary Facebook page. Shown here, the gateway makes it easy for users to find their local pages.

## Starbucks Around The World

*Coffee is a passion that knows no borders. Share yours with Starbucks community members across the globe.*

North America	Europe	Asia
Canada	Austria	Hong Kong
United States	Belgium	Indonesia
Mexico	Czech Republic	Japan
Puerto Rico	France	Malaysia
<b>Central America</b>	Germany	Philippines
Costa Rica	Greece	Singapore
El Salvador	Hungary	South Korea
Guatemala	Poland	Taiwan
<b>South America</b>	Ireland	Thailand
Argentina	Netherlands	Australia
Brazil	Spain	
Peru	Switzerland	
	Turkey	
	United Kingdom	
	Russia	
	Portugal	

## About the Author

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John Yunker, co-founder of Byte Level Research and Byte Level Books, 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 nine annual editions of *The Web Globalization Report Card*.



John is the 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 also authored *The Art of the Global Gateway*, available in PDF, paperback, and Kindle formats ([www.bytelevel.com/books/gateway](http://www.bytelevel.com/books/gateway)).

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## Byte Level Research Services

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Byte Level Research LLC is a research and publishing company devoted to web and content globalization. Founded in 2000 by John Yunker and Midge Raymond, Byte Level provides research, training, and consulting services.

### Industry Benchmarks

*The Web Globalization Report Card* provides a high-level understanding of global websites, but often companies want a more in-depth analysis as well as benchmarking against specific competitors within their industry. We pioneered the practice of web globalization benchmarking, and we have evaluated more than 500 websites across all major industries. We provide valuable, hands-on recommendations that help companies improve traffic to local sites, improve usability, and save money along the way.

### Training and Seminars

Let Byte Level train your organization to effectively develop and maintain a multilingual website. We specialize in full-day “global summits,” conducted with web and marketing teams.

For more information, contact John Yunker at [jyunker@bytelevel.com](mailto:jyunker@bytelevel.com) or (+1) 760-300-3620.

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