

Welsh Language Board March 2007

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TECHNICAL NOTE ON SURVEY METHODOLOGY

Sampling and Fieldwork

The Cwmnibus sample is designed to be representative of all SME business establishments located in Wales. Business establishments are identified through ownership of a business telephone line.

“*Businesses*” are defined using UK Standard Industrial Classification (1992) as follows:

Business Activities included	SIC Category
<i>Agriculture, Fishing, Mining & Utilities</i>	A, B, C, E
<i>Manufacturing</i>	D
<i>Construction, Transport/communications</i>	F, I
<i>Wholesale & Retail</i>	G
<i>Finance, Real estate/business activities</i>	J, K
<i>Hotels, Restaurants and other services</i>	H, O (90,92,93 only)

Categories L (*Public administration/defence*), M (*Education*), N (*Health/Social Work*), O (91 only: *Membership organisations*), P (*Private households*) and Q (*Extra-territorial organisations*) are excluded from the survey.

SMEs are defined as businesses with up to 250 employees (full or part-time) at the location contacted.

Eligible respondents are defined as *The Manager, Proprietor, Owner, Managing Director* or *other senior manager* present at the time of interview.

In total 504 telephone interviews were undertaken between 19th – 30th March 2007. All interviewing was undertaken by trained Beaufort fieldworkers from our offices in central Cardiff to BS7911 standards.

Interviews were conducted using Computer Aided Telephone Interviewing technology.

Interlocking quotas were set on business activity and size within region based on universe counts supplied by Experian (incorporating Yell Data).

A sample of businesses was selected randomly by Experian. Businesses within each activity group and region were then randomly contacted and interviewed until the quota targets had been met. Only one interview was conducted within any one business.

Tables

A 48 cell weighting matrix (8 regions X 6 business activity groups) has been used to weight data to correct small deviations from the required quota or discrepancies between the Yell Data SIC classification and the business's self-reported business activity.

Tables are presented in the form of numbers and integer percentages with the unweighted and weighted sample base shown at the top of each column. Where the base is anything other than the total sample this is indicated underneath the table heading and follows logically from the question sequence and routing.

Arithmetic rounding to whole numbers means that columns of percentages do not necessarily sum to exactly 100%. Where more than one answer can be given to a question the sum of percentages may exceed 100%. 0 denotes a weighted sample of less than 0.5 and 0% denotes a percentage of less than 0.5%. Where column bases are less than about 50, percentages need to be interpreted with care.

A standard analysis of questions asked is provided as an integral part of the service involving general business information collected as a matter of course during the interview. This breaks response down by classification variables (breakdowns) as shown overleaf.

Classification

Area	
North Wales	<i>Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire, Wrexham</i>
Mid/West Wales	<i>Powys, Ceredigion, Carmarthenshire, Pembrokeshire</i>
West South Wales	<i>Swansea, Neath/PT, Bridgend</i>
South East Wales	<i>Merthyr Tydfil, RCT, Caerphilly, Blaenau Gwent, Torfaen, Vale of Glamorgan, Cardiff, Newport, Monmouthshire</i>
Number of employees <i>(All part-time and full-time employees permanently employed at the location contacted, including respondent)</i>	
1	<i>Sole traders</i>
2-9	<i>Small businesses with 2-9 employees</i>
10+	<i>Small and medium sized businesses with ten or more employees</i>
Activity group	
Wholesale & Retail	<i>SIC group G</i>
Hotels, Restaurants and other services	<i>SIC groups H, O (90,92,93 only)</i>
Agriculture, Fishing, Mining & Utilities	<i>SIC groups A, B, C, E</i>
Manufacturing	<i>SIC group D</i>
Construction, Transport/communications	<i>SIC groups F, I</i>
Finance, Real estate/business activities	<i>SIC groups J, K</i>
Turnover <i>(For last financial year in relation to location contacted only)</i>	
Under 100k	
£101-500k	
£501+	
Refused/DK	
Ownership	
Subsidiary/branch	<i>Wholly owned subsidiary or operating unit of a larger company</i>
Independent	<i>Neither of the above</i>

Q1a. Which of the following does your business ever use?
READ OUT AND CODE WHETHER OR NOT EACH IS USED:

-Signage, for example on the shop front, on van sides, etc
-Printed materials, for example leaflets, menus, etc
-Adverts in the press
-Headed paper, business cards and compliments slips
-Packaging and labelling
-Web site

- 1 Do use
- 2 Do not use
- 3 &Don't know

FOR EACH USED AT Q1a, Q1b WILL BE ASKED

Q1b. Do you include any Welsh language on the following services that you use?
READ OUT, CODE WHETHER WELSH LANGUAGE IS USED:

-Signage, for example on the shop front, on van sides, etc
-Printed materials, for example leaflets, menus, etc
-Adverts in the press
-Headed paper, business cards and compliments slips
-Packaging and labelling
-Web site

- 1 Welsh used
- 2 Welsh not used
- 3 &Don't know

Q2. What's the language of your corporate image? That is the language used with any logo? Is it.....

- 1 Welsh
- 2 English
- 3 Bilingual - Welsh and English
- 4 Other (please specify)
- 50 &Don't know

Q3a. Do you ever receive any written correspondence from customers in Welsh at all?

- 1 Yes → Q3b
- 2 No → Q4
- 3 &Don't know → Q4

Q3bi. If you needed to write back to these correspondences, would you (or someone within your organisation) ever do so in Welsh?
IF YES, ASK: Is that always, usually or sometimes?

- 1 Yes - always
- 2 Yes - usually
- 3 Yes - sometimes
- 4 No - never
- 5 &Don't know

Q3bii. If you needed to speak to these correspondences, would you (or someone within your organisation) ever do so in Welsh?
IF YES, ASK: Is that always, usually or sometimes?

- 1 Yes - always
- 2 Yes - usually
- 3 Yes - sometimes
- 4 No - never
- 5 &Don't know

Q4a. Do you use Microsoft Office 2003 or Windows XP, or OpenOffice on your computers in work?
CODE ALL MENTIONED

- 1 Microsoft Office 2003 \ Windows XP → Q4bi
- 2 OpenOffice → Q4bi
- 3 None of these used → Q5
- 4 &Don't know → Q5

Q4bi. Do you use the Welsh language interface on
(READ OUT EACH SOFTWARE USED AND CODE YES\NO)

.... Microsoft Office 2003 \ Windows XP

.... OpenOffice

- 1 Yes
 - 2 No
 - 3 &Don't know
-

Analysis.: Q1ai Does your business ever use signage, for example on the shop front, on van sides, etc.?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	504	119	108	72	205	120	286	98	132	116	35	57	80	84	78	64	58	304	231	271	
Weighted	504	118	110	80	196	125	283	96	124	120	39	59	79	83	80	64	57	303	232	270	
Do use	359 71%	80 67%	72 66%	65 81%	143 73%	70 56%	208 74%	81 85%	112 90%	94 79%	9 22%	35 60%	60 77%	49 59%	44 55%	52 82%	42 73%	221 73%	185 80%	173 64%	
Do not use	144 29%	39 33%	38 34%	15 19%	53 27%	55 44%	75 26%	15 15%	13 10%	26 21%	30 78%	24 40%	19 23%	34 41%	36 45%	11 18%	15 27%	82 27%	47 20%	97 36%	

Analysis.: Q1aii Does your business ever use printed materials, for example leaflets, menus, etc.?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	504	119	108	72	205	120	286	98	132	116	35	57	80	84	78	64	58	304	231	271	
Weighted	504	118	110	80	196	125	283	96	124	120	39	59	79	83	80	64	57	303	232	270	
Do use	276 55%	69 59%	47 43%	45 56%	114 58%	55 44%	155 55%	66 69%	67 54%	91 76%	8 20%	31 52%	32 40%	48 57%	33 41%	38 60%	33 57%	172 57%	138 59%	136 50%	
Do not use	228 45%	49 41%	63 57%	35 44%	82 42%	70 56%	129 45%	30 31%	58 46%	29 24%	31 80%	28 48%	47 60%	35 43%	47 59%	25 40%	25 43%	131 43%	94 41%	134 50%	

Analysis.: Q1aiii Does your business ever use adverts in the press?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k- £500k	£501k+	Refused/ DK	Subsidiary/ Branch	Independent	
Total																					
Unweighted	504	119	108	72	205	120	286	98	132	116	35	57	80	84	78	64	58	304	231	271	
Weighted	504	118	110	80	196	125	283	96	124	120	39	59	79	83	80	64	57	303	232	270	
Do use	251 50%	57 48%	55 50%	38 48%	101 52%	57 45%	135 48%	59 62%	65 53%	67 56%	5 13%	30 51%	43 55%	40 48%	37 46%	31 49%	34 59%	149 49%	116 50%	133 49%	
Do not use	253 50%	62 52%	55 50%	41 52%	95 48%	68 55%	148 52%	36 38%	59 47%	53 44%	34 87%	29 49%	36 45%	43 52%	43 54%	32 51%	24 41%	153 51%	116 50%	137 51%	

Analysis.: Q1aiv Does your business ever use headed paper, business cards and compliments slips?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k- £500k	£501k+	Refused/ DK	Subsidiary/ Branch	Independent	
Total																					
Unweighted	504	119	108	72	205	120	286	98	132	116	35	57	80	84	78	64	58	304	231	271	
Weighted	504	118	110	80	196	125	283	96	124	120	39	59	79	83	80	64	57	303	232	270	
Do use	372 74%	87 74%	71 64%	60 75%	155 79%	87 69%	204 72%	82 85%	82 66%	84 70%	10 25%	54 91%	62 79%	80 97%	58 72%	48 75%	52 90%	215 71%	164 71%	207 77%	
Do not use	132 26%	31 26%	39 36%	20 25%	41 21%	38 31%	79 28%	14 15%	42 34%	36 30%	29 75%	5 9%	16 21%	3 3%	22 28%	16 25%	6 10%	88 29%	68 29%	63 23%	

Analysis.: Q1av Does your business ever use packaging and labelling?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k- £500k	£501k+	Refused/ DK	Subsidiary/ Branch	Independent	
Total																					
Unweighted	504	119	108	72	205	120	286	98	132	116	35	57	80	84	78	64	58	304	231	271	
Weighted	504	118	110	80	196	125	283	96	124	120	39	59	79	83	80	64	57	303	232	270	
Do use	132 26%	26 22%	24 22%	22 27%	61 31%	15 12%	77 27%	40 42%	58 47%	18 15%	2 5%	20 34%	10 13%	24 29%	8 10%	15 24%	24 41%	85 28%	74 32%	58 21%	
Do not use	372 74%	93 78%	87 78%	58 73%	135 69%	110 88%	206 73%	56 58%	66 53%	102 85%	37 95%	39 66%	69 87%	59 71%	73 90%	48 76%	34 59%	218 72%	158 68%	212 79%	

Analysis.: Q1avi Does your business ever use a website?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	504	119	108	72	205	120	286	98	132	116	35	57	80	84	78	64	58	304	231	271	
Weighted	504	118	110	80	196	125	283	96	124	120	39	59	79	83	80	64	57	303	232	270	
Do use	254 50%	58 49%	45 40%	43 54%	109 56%	43 34%	137 48%	74 77%	61 49%	56 47%	7 18%	35 59%	35 44%	61 73%	30 37%	34 54%	45 79%	145 48%	123 53%	130 48%	
Do not use	248 49%	60 51%	66 60%	37 46%	85 43%	82 66%	146 52%	20 21%	62 50%	64 53%	32 82%	24 41%	44 56%	22 27%	51 63%	29 46%	12 21%	156 52%	108 46%	139 52%	
Don't know	2 0%	- -	- -	- -	2 1%	- -	- -	2 2%	2 1%	- -	- -	- -	- -	- -	- -	- -	- -	2 1%	1 0%	1 0%	

Analysis.: Q1bi Do you include any Welsh language on the signage, for example on the shop front, on van sides, etc. that you use?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

Text.....: This table only includes businesses that ever use signage.

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	360	81	71	59	149	67	210	83	118	91	7	34	61	49	43	53	42	222	185	173	
Weighted	359	80	72	65	143	70	208	81	112	94	9	35	60	49	44	52	42	221	185	173	
Welsh used	81 22%	34 42%	19 27%	9 13%	19 14%	11 16%	48 23%	21 26%	25 22%	28 29%	1 12%	3 9%	12 19%	12 25%	9 21%	15 28%	9 23%	47 21%	59 32%	22 13%	
Welsh not used	279 78%	46 58%	53 73%	56 87%	124 86%	58 84%	160 77%	60 74%	87 78%	67 71%	8 88%	32 91%	49 81%	37 75%	35 79%	38 72%	32 77%	174 79%	126 68%	150 87%	

Analysis.: Q1bii Do you include any Welsh language on the printed materials, for example leaflets, menus, etc. that you use?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

Text.....: This table only includes businesses that ever use printed materials.

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	278	70	47	41	120	54	156	68	72	88	7	30	32	49	32	39	33	174	139	137	
Weighted	276	69	47	45	114	55	155	66	67	91	8	31	32	48	33	38	33	172	138	136	
Welsh used	69 25%	30 44%	16 33%	7 15%	16 14%	14 26%	38 25%	16 25%	18 26%	22 24%	2 26%	8 27%	9 28%	10 20%	7 23%	11 28%	6 17%	44 26%	41 30%	27 20%	
Welsh not used	207 75%	39 56%	32 67%	38 85%	98 86%	41 74%	117 75%	50 75%	49 74%	69 76%	6 74%	22 73%	23 72%	38 80%	26 77%	27 72%	27 83%	127 74%	97 70%	108 80%	

Analysis.: Q1biii Do you include any Welsh language on the adverts in the press?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

Text.....: This table only includes businesses that ever use adverts in the press.

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	253	57	54	35	107	55	137	61	70	65	5	29	43	41	36	32	34	151	116	135	
Weighted	251	57	55	38	101	57	135	59	65	67	5	30	43	40	37	31	34	149	116	133	
Welsh used	36 14%	12 22%	11 20%	3 8%	9 9%	3 5%	23 17%	9 16%	12 19%	6 9%	1 19%	3 10%	4 9%	10 24%	2 5%	9 28%	3 8%	22 15%	22 19%	13 10%	
Welsh not used	211 84%	44 78%	44 80%	33 86%	90 89%	54 95%	110 81%	48 81%	52 80%	61 91%	4 81%	27 90%	38 89%	28 71%	35 95%	22 72%	30 89%	124 83%	90 78%	119 90%	
Don't know	4 2%	- -	- -	2 6%	2 2%	- -	2 2%	2 3%	1 1%	- -	- -	- -	1 2%	2 5%	- -	- -	1 3%	3 2%	3 3%	1 1%	

Analysis.: Q1biv Do you include any Welsh language on the headed paper, business cards and compliments slips that you use?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

Text.....: This table only includes businesses that ever use headed paper, business cards and compliments slips.

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	374	88	69	54	163	85	206	83	88	81	9	52	63	81	57	48	52	217	164	209	
Weighted	372	87	71	60	155	87	204	82	82	84	10	54	62	80	58	48	52	215	164	207	
Welsh used	46 12%	25 29%	12 17%	- -	9 6%	8 9%	28 14%	10 12%	15 18%	12 14%	1 10%	5 10%	3 5%	10 12%	6 10%	6 13%	4 7%	30 14%	30 18%	16 8%	
Welsh not used	325 87%	62 71%	59 83%	60 100%	145 94%	79 91%	176 86%	71 87%	66 81%	72 86%	9 90%	49 90%	59 95%	71 88%	52 90%	42 87%	48 93%	184 86%	133 81%	191 92%	
Don't know	1 0%	- -	- -	- -	1 1%	- -	- -	1 1%	1 1%	- -	- -	- -	- -	- -	- -	- -	- -	1 0%	1 1%	- -	

Analysis.: Q1bv Do you include any Welsh language on the packaging and labelling that you use?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

Text.....: This table only includes businesses that ever use packaging and labelling.

	Total	Area				Employees			Activity					Turnover			Ownership				
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	134	26	23	20	65	14	79	41	62	17	2	19	10	24	7	16	23	88	76	58	
Weighted	132	26	24	22	61	15	77	40	58	18	2	20	10	24	8	15	24	85	74	58	
Welsh used	14 11%	4 16%	5 21%	- -	5 8%	2 14%	7 9%	5 12%	3 5%	4 23%	1 48%	3 15%	- -	3 13%	1 13%	1 6%	2 8%	10 12%	8 11%	6 11%	
Welsh not used	116 88%	21 84%	19 79%	22 100%	54 89%	13 86%	69 90%	34 86%	54 94%	14 77%	1 52%	17 85%	10 100%	20 83%	7 87%	14 94%	22 92%	73 86%	65 87%	51 89%	
Don't know	2 2%	- -	- -	- -	2 3%	- -	1 1%	1 2%	1 2%	- -	- -	- -	- -	1 4%	- -	- -	- -	2 2%	2 3%	- -	

Analysis.: Q1bvi Do you include any Welsh language on the website that you use?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight.....: w1(w100)

Cells.....: Absolute, Break %, Respondents

Text.....: This table only includes businesses that ever use a website.

	Total	Area				Employees			Activity					Turnover			Ownership				
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	256	58	43	39	116	41	138	77	65	55	6	33	35	62	28	35	46	147	125	130	
Weighted	254	58	45	43	109	43	137	74	61	56	7	35	35	61	30	34	45	145	123	130	
Welsh used	25 10%	12 20%	8 19%	2 6%	3 3%	2 5%	14 10%	9 12%	5 8%	6 11%	1 15%	3 10%	1 3%	9 15%	2 7%	4 11%	5 11%	14 10%	20 16%	5 4%	
Welsh not used	217 86%	43 75%	34 76%	39 92%	101 92%	38 90%	119 87%	60 81%	50 82%	48 86%	6 85%	30 87%	34 97%	50 82%	26 89%	29 83%	40 89%	122 84%	95 77%	121 94%	
Don't know	12 5%	3 5%	2 5%	1 2%	5 5%	2 5%	4 3%	6 8%	6 11%	2 4%	- -	1 4%	- -	2 3%	1 4%	2 6%	- -	8 6%	8 7%	3 3%	

Analysis.: Q2 What's the language of your corporate image? That is the language used with any logo?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	504	119	108	72	205	120	286	98	132	116	35	57	80	84	78	64	58	304	231	271	
Weighted	504	118	110	80	196	125	283	96	124	120	39	59	79	83	80	64	57	303	232	270	
Welsh	20 4%	12 10%	8 7%	- -	- -	6 5%	12 4%	2 2%	3 2%	4 3%	8 21%	3 5%	- -	2 3%	5 7%	1 2%	1 2%	13 4%	8 3%	12 5%	
English	419 83%	83 70%	74 67%	76 96%	185 95%	104 83%	229 81%	86 90%	109 88%	102 85%	20 52%	51 86%	68 86%	68 82%	68 85%	54 85%	50 87%	247 82%	185 80%	231 86%	
Bilingual - Welsh and English	63 12%	23 19%	27 25%	3 4%	9 5%	15 12%	40 14%	8 8%	12 10%	13 11%	10 27%	5 8%	11 14%	11 14%	7 9%	9 14%	6 11%	41 13%	38 17%	24 9%	
Don't know	2 0%	- -	1 1%	- -	1 1%	- -	2 1%	- -	- -	1 1%	- -	- -	- -	1 1%	- -	- -	- -	2 1%	- -	2 1%	

Analysis.: Q3a Do you ever receive any written correspondence from customers in Welsh at all?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	504	119	108	72	205	120	286	98	132	116	35	57	80	84	78	64	58	304	231	271	
Weighted	504	118	110	80	196	125	283	96	124	120	39	59	79	83	80	64	57	303	232	270	
Yes	108 21%	43 37%	33 30%	13 16%	18 9%	29 23%	56 20%	23 24%	24 20%	21 18%	16 40%	15 26%	17 21%	14 17%	20 24%	12 19%	15 26%	61 20%	56 24%	52 19%	
No	396 78%	75 63%	77 70%	67 84%	177 90%	96 77%	226 80%	73 76%	99 80%	99 82%	24 60%	43 74%	62 79%	69 83%	61 76%	52 81%	43 74%	241 79%	175 76%	218 81%	
Don't know	1 0%	-	-	-	1 0%	-	1 0%	-	1 1%	-	-	-	-	-	-	-	-	1 0%	1 0%	-	

Analysis.: Q3bi If you needed to write back to these correspondences, would you (or someone within your organisation) ever do so in Welsh?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight.....: w1(w100)

Score.....: Mean Score: Always = 3, Usually = 2, Sometimes = 1, Never = 0.

Cells.....: Absolute, Break %, Respondents

Text.....: This table only includes businesses that ever receive any written correspondence from customers in Welsh.

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	107	44	33	11	19	27	57	23	26	21	14	15	17	14	19	12	15	61	55	52	
Weighted	108	43	33	13	18	29	56	23	24	21	16	15	17	14	20	12	15	61	56	52	
Yes - always	62 57%	27 62%	22 67%	9 67%	4 21%	18 61%	29 52%	15 65%	13 55%	12 57%	10 66%	8 55%	8 46%	10 69%	5 27%	7 59%	10 67%	40 64%	37 67%	24 47%	
Yes - usually	2 2%	-	1 3%	-	1 6%	1 3%	1 2%	-	-	1 5%	-	-	-	1 8%	-	-	-	2 3%	2 4%	-	
Yes - sometimes	11 10%	5 12%	2 6%	1 9%	3 17%	2 7%	6 11%	3 13%	2 8%	4 19%	1 7%	2 13%	1 7%	1 8%	6 32%	1 7%	-	4 7%	5 9%	6 12%	
No - never	32 30%	11 26%	8 24%	3 25%	9 51%	8 28%	19 33%	5 22%	9 38%	4 19%	4 28%	4 26%	8 47%	2 16%	8 41%	4 34%	5 33%	15 24%	11 20%	21 40%	
Don't know	1 1%	-	-	-	1 5%	-	1 2%	-	-	-	-	1 6%	-	-	-	-	-	1 2%	-	1 2%	
Mean	1.88	1.99	2.13	2.09	0.96	1.97	1.75	2.09	1.72	2.01	2.04	1.89	1.45	2.29	1.13	1.83	2.00	2.10	2.18	1.55	

Analysis.: Q3bii If you needed to speak to these correspondences, would you (or someone within your organisation) ever do so in Welsh?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight.....: w1(w100)

Score.....: Mean Score: Always = 3, Usually = 2, Sometimes = 1, Never = 0.

Cells.....: Absolute, Break %, Respondents

Text.....: This table only includes businesses that ever receive any written correspondence from customers in Welsh.

	Total	Area				Employees			Activity					Turnover			Ownership				
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	107	44	33	11	19	27	57	23	26	21	14	15	17	14	19	12	15	61	55	52	
Weighted	108	43	33	13	18	29	56	23	24	21	16	15	17	14	20	12	15	61	56	52	
Yes - always	64 59%	27 62%	26 79%	8 59%	3 15%	18 61%	33 60%	13 56%	14 58%	11 53%	12 79%	8 55%	7 40%	11 76%	7 37%	5 41%	10 67%	42 68%	39 71%	24 47%	
Yes - usually	2 2%	-	-	1 8%	1 5%	-	1 2%	1 4%	1 4%	-	-	1 6%	-	-	-	-	-	2 3%	1 2%	1 2%	
Yes - sometimes	13 12%	5 12%	2 6%	1 9%	5 28%	4 14%	5 9%	4 18%	1 4%	5 24%	1 7%	2 13%	3 18%	1 8%	5 27%	2 17%	1 7%	5 8%	4 7%	9 18%	
No - never	28 26%	10 24%	5 15%	3 25%	9 52%	6 21%	17 29%	5 22%	8 34%	5 23%	2 14%	4 26%	7 43%	1 8%	7 36%	5 42%	4 27%	12 19%	11 20%	17 32%	
Don't know	1 1%	1 2%	-	-	-	1 4%	-	-	-	-	-	-	-	1 7%	-	-	-	1 2%	-	1 2%	
Mean	1.95	2.03	2.44	2.01	0.84	2.04	1.91	1.94	1.87	1.82	2.45	1.90	1.37	2.56	1.38	1.40	2.07	2.22	2.23	1.65	

Analysis.: Q4a Do you use Microsoft Office 2003 or Windows XP, or OpenOffice on your computers in work?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight.....: w1(w100)

Cells.....: Absolute, Break %, Respondents

	Total	Area				Employees			Activity						Turnover			Ownership			
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	504	119	108	72	205	120	286	98	132	116	35	57	80	84	78	64	58	304	231	271	
Weighted	504	118	110	80	196	125	283	96	124	120	39	59	79	83	80	64	57	303	232	270	
Microsoft Office 2003 \ Windows XP	335 66%	85 72%	69 63%	47 60%	133 68%	72 58%	187 66%	76 79%	67 54%	84 70%	16 42%	45 76%	55 70%	69 83%	55 68%	52 82%	50 87%	178 59%	151 65%	183 68%	
OpenOffice	19 4%	3 3%	3 3%	3 4%	9 5%	1 1%	10 4%	7 8%	7 6%	2 2%	- -	1 2%	- -	8 10%	2 3%	2 3%	4 7%	10 3%	7 3%	12 4%	
None of these used	158 31%	31 26%	41 37%	30 38%	55 28%	53 42%	91 32%	14 14%	52 42%	35 30%	23 58%	11 19%	23 30%	12 15%	25 31%	10 15%	6 11%	117 39%	72 31%	84 31%	
Don't know	8 2%	2 2%	- -	1 1%	5 2%	1 1%	3 1%	4 4%	2 1%	1 1%	- -	3 5%	1 1%	1 1%	1 1%	1 2%	- -	6 2%	5 2%	3 1%	

Analysis.: Q4bi Do you use the Welsh language interface on Microsoft Office 2003\Windows XP?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

Text.....: This table only includes businesses that use Microsoft Office 2003\Windows XP.

	Total	Area				Employees			Activity					Turnover			Ownership				
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	335	85	67	43	140	70	188	77	70	81	15	43	56	70	53	52	51	179	150	184	
Weighted	335	85	69	47	133	72	187	76	67	84	16	45	55	69	55	52	50	178	151	183	
Yes	10 3%	7 8%	1 2%	- -	2 1%	3 5%	4 2%	3 4%	3 4%	1 1%	- -	2 5%	- -	4 5%	2 4%	1 2%	2 4%	5 3%	6 4%	4 2%	
No	322 96%	78 92%	68 98%	46 98%	130 97%	69 95%	182 97%	71 94%	64 96%	83 99%	16 100%	40 90%	54 98%	65 95%	52 96%	51 98%	47 94%	172 96%	146 96%	176 96%	
Don't know	3 1%	- -	- -	1 2%	2 1%	- -	1 1%	2 3%	- -	- -	- -	2 4%	1 2%	- -	- -	- -	1 2%	2 1%	- -	3 2%	

Analysis.: Q4bii Do you use the Welsh language interface on OpenOffice?

Break.....: c1:c2:c3:c4:c5

Filter.....: All Respondents

Weight....: w1(w100)

Cells.....: Absolute, Break %, Respondents

Text.....: This table only includes businesses that use OpenOffice.

	Total	Area				Employees			Activity					Turnover			Ownership				
		North Wales	Mid/West Wales	West South Wales	South East Wales	1	2-9	10+	Wholesale, Retail	Hotels, Other Services	Agriculture, Mining, Utilities	Manufacturing	Construction, Transport	Finance, Business Services	Under £100k	£101k-£500k	£501k+	Refused/DK	Subsidiary/Branch	Independent	
Total																					
Unweighted	19	3	3	3	10	1	10	8	8	2	-	1	-	8	2	2	4	11	7	12	
Weighted	19	3	3	3	9	1	10	7	7	2	-	1	-	8	2	2	4	10	7	12	
Yes	2 10%	2 65%	- -	- -	- -	- 10%	1 12%	1 13%	- -	- -	- -	- -	1 13%	- -	- -	- -	2 19%	- -	2 17%		
No	17 90%	1 35%	3 100%	3 100%	9 100%	1 100%	9 90%	6 88%	6 87%	2 100%	- -	1 100%	- -	7 87%	2 100%	2 100%	4 100%	9 81%	7 100%	10 83%	