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1. INTRODUCTION

Background and Objectives

- 1.1 The Welsh Language Board is developing a marketing strategy for the language based upon a general strategy document published in October 1999. The Board needs to be able to assess the advantages and disadvantages of the activities proposed, together with the opportunities and problems associated with the various elements of the strategy.
- 1.2 Following a comprehensive survey of public attitudes to the Welsh language conducted on behalf of the Board by NOP in 1995, the Board wished to build on the information collected in that study and commissioned Beaufort Research to undertake the research which is described in this report. It was hoped the results would enable the Board to prioritise its target audiences and provide benchmarks against which the success of specific campaigns might be assessed in the future.
- 1.3 The objectives of the survey were to allow the Board to determine:
- the nature of the ‘demand’ for the Welsh language among both the Welsh speaking and non-Welsh speaking sectors of the adult population in Wales
 - the perceptual/attitudinal context in which this ‘demand’ exists
 - the level of use of the language in various social contexts
 - the likely public response to an increased use of Welsh within Wales
 - attitudes to Welsh medium education and its role in securing a future for the language
- 1.4 The research was to be completed and published within the calendar year 2000 and the Board sought to achieve the maximal use of finite budgetary resources.

The Report

- 1.5 This document, written by Beaufort, brings together the main findings of the research which was undertaken in March/April 2000. It is accompanied by two separate volumes of computer tabulations containing the full survey results.
- 1.6 Both this report and the sets of tables (in more detail) include a description of the methodology employed. The bilingual survey questionnaire appears at the end of this document and is also included with the tabulations.

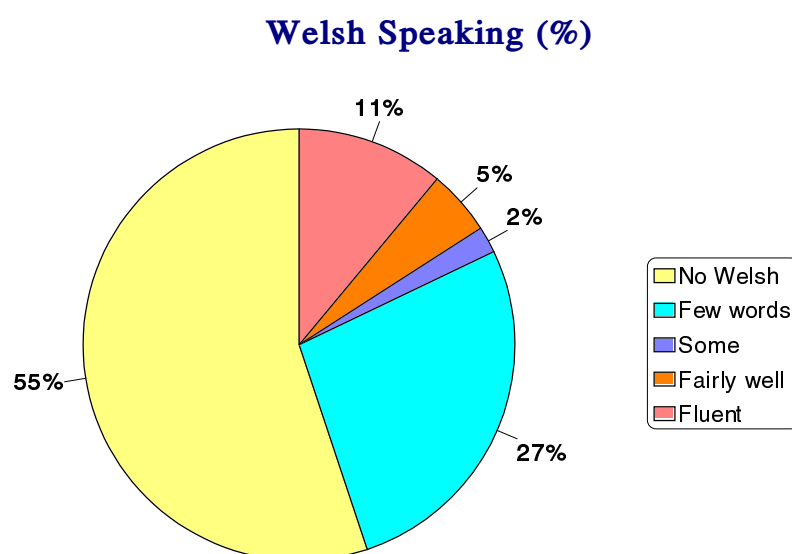
Method

- 1.7 The research universe for the study was defined as adults aged 16 and over resident in Wales who are not professionally involved in market research or journalism. The primary sampling units were sub districts of local authority areas and a total of 80 interviewing locations throughout Wales were selected at each of which 15 interviews were to be completed using a quota sampling procedure.
- 1.8 The sample was deliberately structured to provide statistically reliable sub samples for separate analysis in terms of both unitary authority area and Welsh speaking. Welsh speakers (as defined) comprised 43% of the achieved sample compared with their actual incidence within the defined universe of 17.5% according to the 1991 Census.
- 1.9 Quota controls were set in each sampling point in terms of gender, age group, social class grouping and Welsh speaking to broadly reflect the known demographic profile of Welsh residents. The quota of Welsh speakers in each location was individually set to achieve the deliberate oversampling required. Welsh speaking for this purpose was defined as choosing one of these statements at Q.1:
- Yes, I speak Welsh fluently
 - Yes, I speak Welsh fairly well
- No more than one person per household was interviewed.
- 1.10 Interviews were completed face to face at the homes of respondents using an agreed structured bilingual questionnaire designed by Beaufort using a draft compiled (and translated) by the Board. All interviews were conducted in the preferred language or mix of languages of the respondent.
- 1.11 A total of 1,192 interviews were completed (511 of which were with defined Welsh speakers), fieldwork being spread over the period 17th March to 6th April. 44% of all defined Welsh speakers were questioned entirely or mainly in Welsh, with a further 11% in a mixture of Welsh and English. This high level of use of the language is, we believe, unprecedented for a survey of this sort and is a result of the special measures that were taken, both in terms of questionnaire design and the field personnel employed on the study. A quarter of all interviews were in Welsh to at least some extent.
- 1.12 Because of the disproportionate sampling in terms of area and Welsh speaking, it was necessary at the tabulation stage to return each sample cell to its correct relative importance within the total. The resultant weighted sample is thereby representative of Wales as a whole.
- 1.13 We conclude this methodological section with some brief comments on sampling error and the confidence limits that can be applied when interpreting the data. The 95% limits for a sample of 1,192, having incorporated a design factor since simple random sampling did not apply, are estimated to be a maximum of ± 4.2 percentage points where a proportion is being measured. The corresponding confidence limits for the sample of 815 respondents used in 1995 will have been ± 5.1 percent. A difference of at least 5.4 percentage points between the two samples when measuring a particular parameter is significant with 95% confidence.

2. WELSH SPEAKING, READING & WRITING

Welsh Speaking

- 2.1 Welsh speaking for the survey was defined in a particular way for sampling purposes, namely those respondents who answered fluently or fairly well to the initial question ‘Are you able to speak Welsh at all?’. These respondents (360 fluently and 151 fairly well) were deliberately oversampled in a controlled manner: then at the analysis stage these informants, plus those perceiving themselves as speaking some Welsh (65), were weighted back within the total sample to the Census incidence of Welsh speakers within the population.



- 2.2 Based on the weighted sample, 11% were fluent speakers, 5% spoke the language fairly well, 2% spoke some Welsh, 27% spoke just a few words and 55% spoke no Welsh at all. Thus, of those speaking at least some Welsh, nearly two thirds (63%) were fluent and around a quarter (26%) spoke Welsh fairly well. Not surprisingly, fluency was highest in the more obvious Welsh speaking areas such as Gwynedd/Ynys Môn (82%), Ceredigion/Carmarthenshire (71%) and Denbigh/Conwy (60%). In no other region did over half of the Welsh speakers perceive themselves as fluent. If those speaking only some Welsh are excluded, the corresponding proportions become 89%, 75% and 73% respectively.

- 2.3 On the same (latter) basis, fluency tends to increase with age:

16 – 24 years old	52%
25 – 44 years old	71%
45 – 64 year olds	76%
65 and over	75%

- 2.4 Those speaking just a few words of Welsh or none at all were asked whether they understood Welsh at all and just 1% thought they did so fairly well. In Gwynedd/Ynys Môn this proportion was as high as 5% (although the base is very small). Nationally a further 9% considered they understood ‘some’ Welsh and 31% ‘just a few words’. All three proportions are remarkably consistent regardless of sex or age but there is an indication that understanding of the language among those not speaking it is better than average in North West Wales.
- 2.5 All respondents were asked whether they were living with a partner and if so, whether that partner spoke Welsh at all. Overall, Welsh speakers were as likely to be living with partners as non Welsh speakers, with 63% of all respondents so situated. The level was highest in North West Wales (72%) but lowest (57%) in North East Wales. Two thirds of men compared with 60% of women are living with a partner according to the data.
- 2.6 Looking just at Welsh speakers with partners, Welsh speaking being defined as speaking the language fluently or fairly well, 62% had a partner who could also be categorised as a Welsh speaker on this basis. In a quarter of cases the partner spoke only a few words of Welsh or none at all. Male Welsh speakers were more likely to have a partner who also spoke Welsh (69%) than female speakers (57%).

Reading and Writing Welsh

- 2.7 Respondents able to speak at least some Welsh were asked about their reading and writing ability. 62% were, in their opinion, able to read Welsh very well and 26% fairly well. There was a clear distinction between those speaking the language fluently and those doing so fairly well: of the former group 83% read Welsh very well (and 15% fairly well), while for the latter respondents the corresponding proportions were 29% and 53%. The higher reading levels in North West Wales and Ceredigion/Carmarthenshire are a reflection of the higher fluency in those areas.
- 2.8 Reading of Welsh (very well) dips for 25 to 44 year old respondents and then climbs thereafter:
- | | | |
|---------|---|-----|
| 16 – 24 | : | 57% |
| 25 - 44 | : | 54% |
| 45 – 64 | : | 63% |
| 65+ | : | 72% |
- 2.9 The ability to write in Welsh is less prevalent than being able to read the language although again a quarter of those speaking at least some Welsh can do it fairly well. However, ‘only’ 53% thought they could write the language very well. The difference between the fluent speakers and the ‘fairly wells’ are again pronounced.

2.10 The pattern by age is remarkably consistent with only the 25 to 44 year olds bringing the overall average down:

16 – 24	:	55% (very well)
25 - 44	:	46%
45 – 64	:	56%
65+	:	56%

2.11 Looking at the data in other ways, it is estimated that just over half of Welsh speakers are fluent speakers who read and write the language very or fairly well. This group are 10% or thereabouts of all adults resident in Wales aged 16 or over.

2.12 All respondents speaking at least some Welsh were asked how often they used Welsh in the completion of certain documents. Writing Welsh on notes or greeting cards to friends or family is very common, particularly among fluent Welsh speakers, although relatively few always do so. The following table summarises the responses:

<u>Situation</u>	% Writing Welsh			<u>Total</u>	<u>Fluent Speakers</u>	<u>Writes Welsh Very/Fairly Well</u>
	<u>Always</u>	<u>Often</u>	<u>Sometimes</u>			
Notes /greeting cards	24	20	29	73	87	82
E-mails	3	3	6	12	17	13
Official forms	16	7	11	34	46	42
Official letters	14	7	9	30	44	37

2.13 Use of Welsh for E-mails is probably not that poor if one bears in mind the minority of the Welsh population which actually sends e-mails frequently. Writing Welsh when completing official forms or sending official letters to such organisations as the local council or utility companies is somewhat low, with less than half of fluent speakers and around a third of all Welsh speakers doing so at least some of the time.

2.14 It is perhaps interesting that among those who claim to write Welsh very or fairly well, the use of the language when completing the documents listed is less than among the fluent speakers. Even the 'Always' percentage is lower within the former group for each of the situations:

% <u>Always</u> using Welsh for:	<u>Fluent speakers</u>	<u>Write Welsh well</u>
Notes/Greeting Cards	36	30
E-mails	4	3
Official forms	24	20
Official letters	21	18

3. WELSH IDENTITY

3.1 Three quarters of respondents (74%) were born in Wales and for most of the others (21%) their birthplace was in England. Among fluent Welsh speakers Wales figured as birth place for 91% and there is then a steady decline in this proportion as the ability to speak the language reduces, ending at 71% of those not speaking Welsh or only a few words;

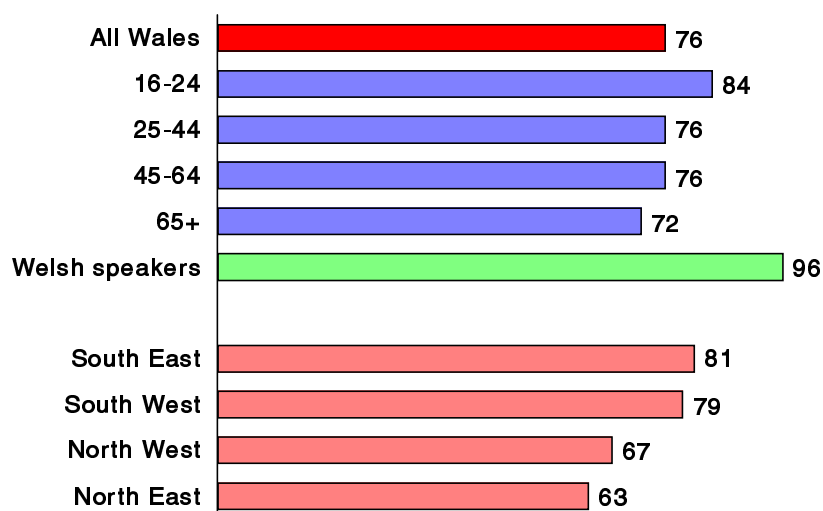
3.2 Being born in Wales is significantly more prevalent in South Wales than North Wales:

	<u>Total region</u>	<u>Welsh speakers in region</u>
North West	58%	82%
North East	61%	93%
South West	77%	94%
South East	79%	91%
All Wales	74%	90%

3.3 Among Welsh speakers (fluently or fairly well) in the North West, the most Welsh speaking area of Wales, 82% were born in the country, compared with over 90% elsewhere. The higher 'Don't Know/Not Sure' in this area (7% compared with 2% overall) only partly accounts for this difference.

3.4 Regardless of birthplace, respondents were asked what they considered themselves to be: Welsh, English, British etc. They were allowed to choose more than one of the various options, e.g. Welsh and British, and in fact the average response was nearly 2 (1.7). While three quarters chose Welsh (76%), close to half of the sample regarded themselves as British (51%). Next came European (20%) and English (19%).

Consider yourself to be Welsh (%)



- 3.5 Welsh speakers, not surprisingly, considered themselves to be more Welsh than non speakers: 96% Welsh and 29% British, compared with 73% and 56% respectively. Welsh identity (defined in this way) increases in the younger age groups and as one moves around Wales in an anti-clockwise direction. Perhaps surprisingly, perceived identity is higher in South East Wales than North West Wales. It also increases as one moves down the social class scale:

DE	85%
C2	78%
C1	71%
AB	63%

- 3.6 Perceived 'Britishness' is higher in the East of Wales than in the West:

South East	58%
North East	64%
South West	36%
North West	38%

whereas 'Englishness' is slightly higher on the North/South axis:

North East	26%
North West	23%
South East	18%
South West	15%

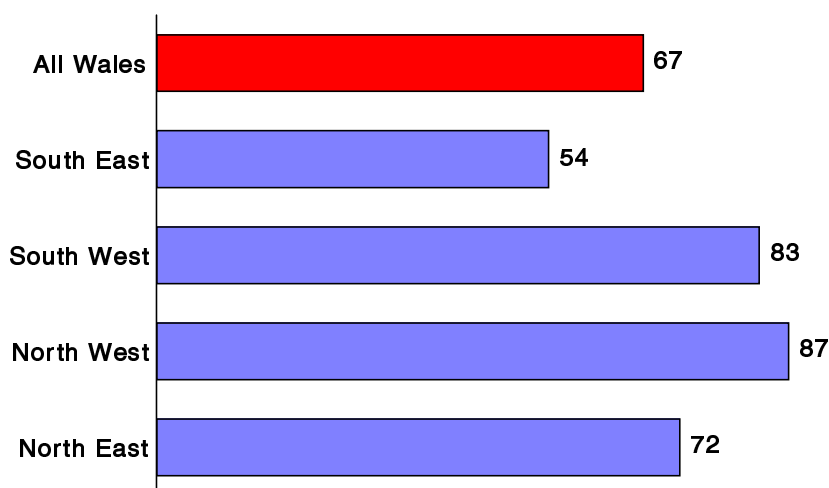
'European' is only significantly over 20% for South East Wales (27%) and AB respondents (30%) – and (although on a relatively small base) among 16 – 24 year old Welsh speakers:

South East	27%
North East	20%
South West	11%
North West	10%

4. ATTITUDES TO THE LANGUAGE

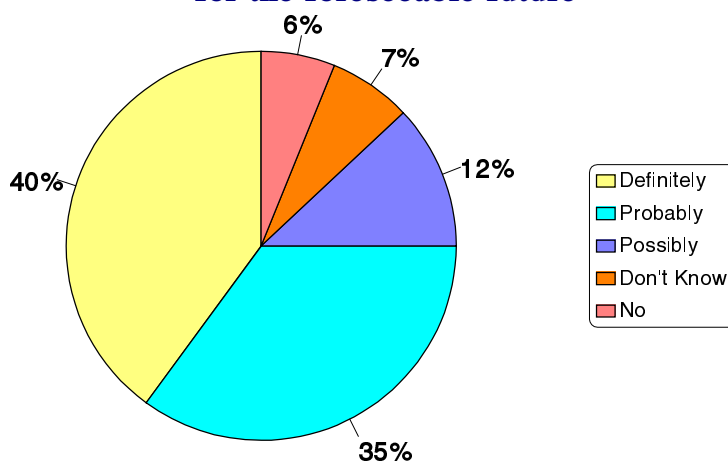
- 4.1 As in the previous (1995) survey there was widespread support across Wales (67%) for use of the Welsh Language. Only 5% of the total sample actually opposed the use of Welsh, this proportion being highest in the South East at 8% and among AB respondents (9%). Claimed indifference was at 23%, being slightly higher in the east of Wales.

Support the Language: strongly/mostly (%)



- 4.2 Even among those who spoke no or very little Welsh there was a clear majority (61%) supporting use of the language, with 26% indifferent. It is not a surprise that those opposing use of Welsh are confined to this group.
- 4.3 An even bigger majority (75%) of Welsh residents believe the language will probably or definitely continue as a living entity for the foreseeable future: approaching half (40%) think it definitely will. This view is widespread across the demographic groups and even among the non Welsh speakers only just short of three quarters subscribe to it.

Welsh will continue as a living language for the foreseeable future



- 4.4 On a regional basis and still looking at whether Welsh will continue as a living entity, the definitely/probably proportion varies from 66% in the South East to 94% in the North West. Only 6% across Wales answered negatively to the question, rising to 9% in the South East and to 14% in the Blaenau Gwent/Torfaen/Newport/Monmouth part of the region. Even within this relatively non Welsh speaking ‘enclave’ there are 48% who support Welsh and 61% who believe it will continue as a living language.

Attitude Statements

- 4.5 A number of statements about the Welsh language were read out to respondents and for each the informant was asked to indicate the extent to which he or she agreed or disagreed with it. Response to these attitudinal statements will prove to be valuable benchmarks when the study is repeated in the future but at this stage there are some interesting differences in agreement by region and demographic group.
- 4.6 The results are summarised below (the statements have been abbreviated slightly for convenience) in terms of Net score and Mean score. The Net scores have been calculated by deducting the proportion disagreeing (mostly or strongly) with the statement from the proportion who agreed. The Mean scores are calculated by assigning a value of 1 to Strongly agree, 2 = Most agree, through to 5 = Strongly disagree. Don’t Knows are excluded from the calculations and the lower the mean score the greater the general agreement.
- 4.7 The statements were generally positive as far as the continuing health of the language is concerned and high levels of agreement can be noted throughout:

	<u>%</u> <u>agreeing</u>	<u>Net</u> <u>score</u>	<u>Mean Score</u>	
			<u>Total</u>	<u>Non</u> <u>speakers</u>
It is important for Welsh culture	89	84	1.67	1.76
If young people don’t use the language, it will die	87	82	1.62	1.69
Something everyone can be proud of	83	78	1.75	1.86
Important that children learn to speak it	81	74	1.76	1.87
Increases sense of a Welsh identity	82	72	1.81	1.91
Belongs to everybody in Wales	80	71	1.85	1.94
Wales is a bilingual country	76	64	2.04	2.15
Two languages – twice the choice	66	58	2.07	2.19
Speakers should ask for a Welsh language service	62	49	2.22	2.35
Relevant to modern life in Wales	67	49	2.27	2.41

Non speakers for the above table are defined as speaking no Welsh or just a few words.

- 4.8 Agreement is slightly less among the non Welsh speakers as one might expect and this group do have a big influence on the overall result. However, the pattern of agreement across the statements is broadly the same regardless of whether Welsh is actually spoken. The importance of the language for Welsh culture and the recognition that young people need to use Welsh or it will die come top of the list and are widely accepted.

- 4.9 Respondents are less sure that Welsh is relevant to modern life in Wales or that Welsh speakers should demand their rights and ask for a Welsh language service but even for these two statements agreement was considerably in excess of disagreement, among both Welsh speakers and others.
- 4.10 The youngest age group of 16 to 24 year olds were less inclined than the general population to agree with statements ii) and iv) concerned with children and young people. The mean scores for this age band were 1.85 for 'if young people don't use the language it will die' (compared with 1.62 overall) and 2.02 for 'important that children learn to speak Welsh' (1.76 in total). Notwithstanding these differences, agreement was generally high within all age bands. However, scores for these two statements among respondents with children aged 2 to 16 living at home were 1.69 and 1.84 respectively, indicating less agreement with both statements than for the sample as a whole. These differences are not statistically significant but one might have expected them to be in the opposite direction.
- 4.11 The contrast between South East and North West Wales in response to the statements is very marked with less agreement than average (rather than actual disagreement) in the former region and greater inclination to agree in the latter area. Only two statements go against this trend as far as the North West is concerned: agreement with 'language belongs to everybody in Wales' is much the same as for the country as a whole, while marginally fewer North West respondents than average believe that if young people don't use the language it will die.
- 4.12 This section concludes with reference to the question addressed to those not fluent in Welsh concerning their inclinations to learn (or improve their) Welsh by attending lessons or evening classes. To a certain extent willingness to learn the language is an expression of interest in the language and its relevance. Just over a quarter of those not speaking Welsh would go to an evening class (19%) or a class at work (8%). A half were just not interested in learning the language.
- 4.13 There were relatively few respondents (65 unweighted) who spoke 'some Welsh' but nearly half of these would consider improving their Welsh, mainly at evening classes. There were more who claimed to speak Welsh fairly well (151) and of these 16% might improve their Welsh, although a similar proportion would not consider doing so.
- 4.14 Willingness to learn/improve peaked among the 25 to 34 year olds (39%), the AB's (39%), those with children (34%) and in the West of Wales, both North and South (31%). Men were slightly more inclined to consider this course of action than women, taken overall.

5. USE OF WELSH IN EVERYDAY SITUATIONS

- 5.1 All respondents answering ‘fluently’, ‘fairly well’ or ‘some’ in answer to the question on ability to speak Welsh – hereafter referred to as Welsh speakers for the purpose of the questions on usage of the language – were asked about their frequency of speaking Welsh in certain situations. Those questions concerned with use of Welsh in the workplace are covered in a subsequent section but we deal here firstly with use of the language in family situations and at school or college.
- 5.2 Speaking Welsh in a particular situation requires the person addressed to also be a Welsh speaker and for both parties to prefer to converse in the language. Interpretation of the responses is made difficult by the ambiguity of the term ‘Not applicable’: someone, for example, who never speaks Welsh during a meal with the family because no other family member speaks Welsh may answer ‘never’ or ‘not applicable’. Similarly, for conversations with a partner or parent who does not speak the language, either answer may justifiably be given: someone without a partner or parent is of course more likely to answer ‘Not applicable’.
- 5.3 It is therefore suggested that when discussing Q’s 3, 4 & 5 it would be advisable to concentrate on the first three options (always, often and sometimes) and to bear in mind that it is only from Q.5 that any estimate can be made of desire or preference to speak Welsh in the particular situations listed. Q.6 deals with another variable, namely perceived confidence in ability to speak Welsh in certain situations.

At Home and at School or College; with Friends

- 5.4 Speaking Welsh during a meal is relatively common, particularly among fluent Welsh speakers, as is (but less so) when talking to a partner or your children if you speak the language fluently. Among Welsh speakers generally however, for a variety of reasons, only half use Welsh to any extent when with partner or children.
- 5.5 The following table summarises the responses:

<u>Situation</u>	% Speaking Welsh			<u>Total</u>	<u>Fluent Speakers</u>
	<u>Always</u>	<u>Often</u>	<u>Sometimes</u>		
During a meal	39	9	20	68	84
With your partner	31	5	10	46	59
With your children	32	8	15	55	63
With your mother	32	4	8	44	54
With your father	26	4	5	35	45

Use of Welsh with parents is of course heavily dependent on whether the parent is alive and speaks Welsh his or herself.

- 5.6 The data for speaking Welsh at school or college is shown below for 16 to 24 year olds only:

	% Speaking Welsh			<u>Total</u>
	<u>Always</u>	<u>Often</u>	<u>Sometimes</u>	
With your teachers/tutors	21	13	17	51
With your friends	15	12	28	55

Again, about half of respondents in the relevant age group speak Welsh to some extent when at school or college.

- 5.7 Speaking Welsh outside of home or work with friends shows a pattern of frequent use of the language:

	<u>Always</u>	<u>Often</u>	<u>Sometimes</u>	<u>Total</u>	<u>Fluent Speakers</u>
Welsh friends	33	22	30	85	97

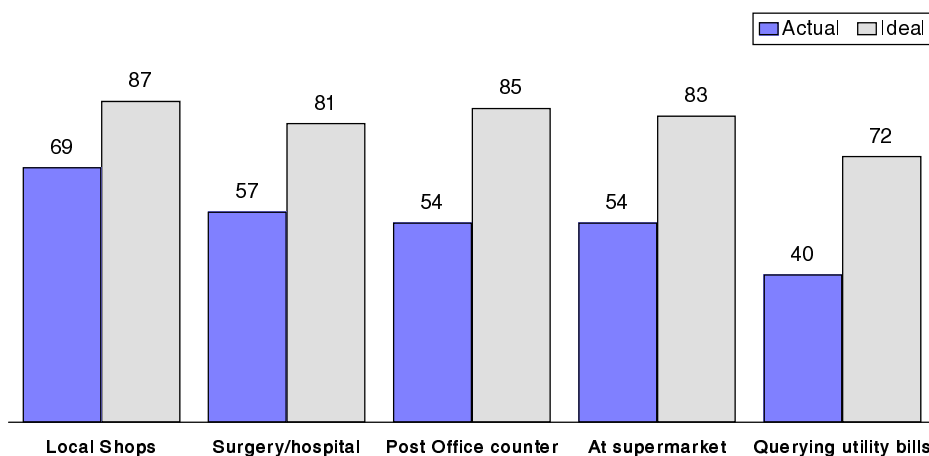
This is the one situation where ‘Not applicable’ is shown as zero since all Welsh speakers apparently have at least one or two friends who speak the language even if some (14%) never speak Welsh with these friends.

Outside Home and the Workplace

- 5.8 Speaking Welsh outside of the home or work is reasonably consistent regardless of the particular situation, especially if the two ‘extremes’ – in local shops and when querying utility bills – are removed. This is the case in terms of how often Welsh is actually spoken (Q.4); how often it would be spoken if the option was available (Q.5); and in terms of self confidence in Welsh speaking ability (Q.6):

Use of Welsh by Welsh speakers: Actual/ideal use (Q5)

Selected situations (total ever %)



<u>Situation</u>	Q.4 (Actual) %		Q.5 (Ideally) %		Q.6 (Confidence) %
	<u>Always</u>	<u>Total</u>	<u>Always</u>	<u>Total</u>	<u>Very/fairly confident</u>
In local shops	24	69	56	87	86
Ordering a drink	21	60	53	82	86
Ordering a meal	19	58	53	82	83
Surgery or local hospital	26	57	54	81	83
At post office counter	27	54	57	85	85
Contacting local council	29	54	53	77	77
At bank/building society	29	54	53	78	81
At supermarket	19	53	54	83	85
Leisure/sports/cultural activities	20	49	49	75	80
Querying utility bills	16	40	49	72	75

5.9 In most of these situations just over half of Welsh speakers use Welsh at least some of the time and between 20 to 30% all of the time. The regional bases are small except for Gwynedd/Ynys Môn, Ceredigion/Carmarthenshire and Denbighshire/Conwy, but it is noticeable that the pattern of usage when comparing these three regions is much the same regardless of situation.

5.10 Speaking Welsh in these situations is highest in Gwynedd/Ynys Môn, both 'Always' and in total, followed by Ceredigion/Carmarthenshire and then, some way behind, by Denbighshire/Conwy. This is exemplified for 'at the post office counter' as shown below:

	Q.4 (Actual) %	
	<u>Always</u>	<u>Total</u>
Gwynedd/Ynys Môn	49	80
Ceredigion/Carmarthenshire	39	72
Denbigh/Conwy	12	40
Total Wales	27	54

- 5.11 Once the condition ‘if the option was available’ is added (Q.5) then ‘always’ speaking Welsh generally more than doubles – to a similar level to that shown for at least some of the time (Total) when considering what actually happens (Q.4). Close to four out of five Welsh speakers would apparently use Welsh at least sometimes (and mostly always) if the option was available, as is shown above in the total column for Q.5. This is obviously because a similar proportion in each case are reasonable confident in their ability to speak Welsh in the particular situation, as shown by the right hand column above (Q.6).
- 5.12 The regional pattern noted in 5.10 is still apparent for Q’s 5 & 6 so the differences in actual use of Welsh between the three regions appear to be as much a function of less confidence in speaking ability as in the fewer opportunities available to use Welsh in certain counties such as Denbighshire/Conwy. Again, ‘at a post office counter’ is shown by way of example:

	Q.5 (Ideally) %		Q.6 (Confidence) %
	<u>Always</u>	<u>Total</u>	<u>Very/fairly confident</u>
Gwynedd/Ynys Môn	80	95	93
Ceredigion/Carmarthenshire	68	90	88
Denbigh/Conwy	48	79	77
Total Wales	57	85	85

6. USE OF WELSH AT WORK AND BY COMPANIES AND SERVICE PROVIDERS

- 6.1 Excluding the self employed (2 to 3% of all respondents) and those full time students and retired persons who have part time jobs, there were 42% of the weighted sample in paid employment, either full or part time. These respondents were asked about their employer, in order to distinguish between public bodies, voluntary organisations/charities and private/public companies.

Employed by:	Companies	61%
	Public bodies	32%
	Voluntary organisations	2%
	Others/not answered	5%

Close to half (47%) of Welsh speakers were employed full or part time.

- 6.2 All respondents speaking Welsh to some extent were asked how often they spoke Welsh in certain workplace situations:

<u>Situation</u>	% Speaking Welsh at Work			<u>Total</u>	<u>Fluent speakers</u>
	<u>Always</u>	<u>Often</u>	<u>Sometimes</u>		
With boss/manager	16	6	9	31	38
With colleagues	18	11	15	44	51
With customers	9	13	16	38	47
On the phone	13	15	21	49	61

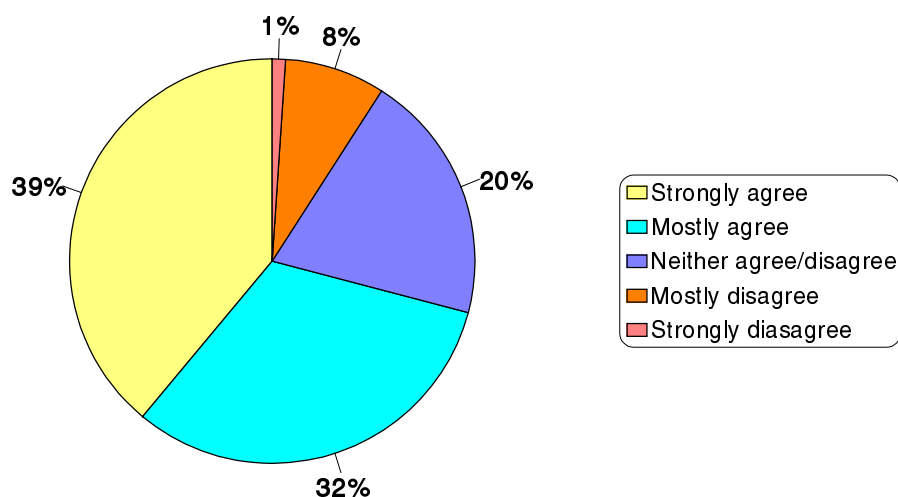
Bearing in mind the proportion of respondents for whom the questions would not have been applicable – just over half were not working – the extent to which Welsh is spoken to at least some extent at work is considerable, particularly on the phone and with colleagues.

- 6.3 Further questions were asked of the employed in order to gauge the extent to which employers employ bilingual personnel for specific purposes and the responses are summarised below:

<u>Specific purpose</u>	Total employed (employers)	Employed by:	
		Public bodies	Companies
	%	%	%
Answering telephone/reception	36	58	25
Customer care/giving advice	36	58	25
Sales people	21	26	19
Management/supervision/training	28	49	17
Other purpose	10	20	5

- 6.4 The wording of the question was such that a positive answer does not necessarily mean that the employer deliberately sets out to take on a bilingual person for the specific purpose. However, it is clear that public bodies are more likely to employ bilingual staff: roughly one in four or one in five of private and public companies do so for the purposes listed. The more general question on employer recruitment of bilingual people ‘wherever possible’ was answered positively by one third of employed respondents, the corresponding proportions for public bodies and companies being 50% and 24% respectively.
- 6.5 A quarter of employed respondents claimed that their employer had a Welsh language scheme or policy, while the same proportion didn’t know or weren’t sure. Very few companies had one (8%) but the majority of public bodies did (55%), although even among the latter’s employees the ‘don’t know’ level was 18%. Most (69%) of voluntary organisations had a scheme or policy but the base is very small.
- 6.6 There is a widespread belief that being bilingual is a help within the job market in Wales: 71% of all respondents mostly or strongly agreed that this was so. Only 9% disagreed, the greatest negative response being in the far South East of Wales (23%), but even here over 50% agreed.

Being bilingual a help in job market



Demand for Bilingual Job Skills

- 6.7 Several sectors of work were read out to respondents, who were asked whether they thought there would be more or less demand in the future for bilingual skills in jobs in those sectors. Relatively few informants foresee reductions in demand as likely, regardless of sector, but the proportion thinking there would be more demand did vary significantly by sector:

	<u>% thinking demand will increase</u>
Teaching	60
Local authorities	48
Health Service	44
Civil Service	43
Call Centres	41
Banks/building societies	40
Shops & Post Offices	33
Leisure/sports centre personnel	29
Pubs/restaurants/hotels	24

6.8 A likely increase in demand for bilingual skills in education is widely recognised and over half of the sample thought there would be more demand for these in the future. For the bottom three sectors above, around six out of ten respondents considered the demand for bilingual skills in the future would be the same as now.

6.9 Regions where the proportion foreseeing increased demand was well above average were as follows:

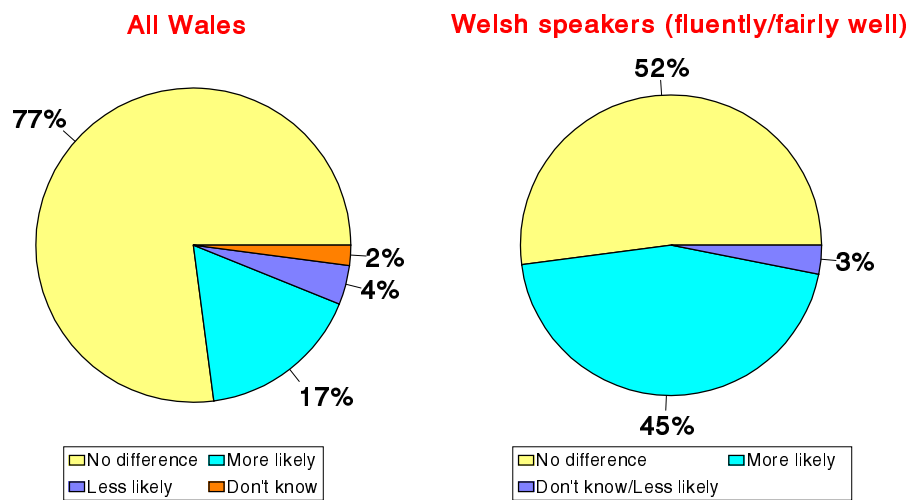
Teaching	:	Cardiff/Vale; Denbigh/Conwy; Ceredigion/Carmarthen
Local Councils	:	Cardiff/Vale; Ceredigion/Carmarthen
Health Service	:	Denbigh/Conwy; Ceredigion/Carmarthen
Civil Service	:	Cardiff/Vale; Ceredigion/Carmarthen
Call Centres	:	Cardiff/Vale; Denbigh/Conwy
Banks/Building Societies		Ceredigion/Carmarthen
Shops & Post Offices	:	Ceredigion/Carmarthen
Leisure/Sports Centres	:	Gwynedd/Ynys Môn; Ceredigion/Carmarthen
Pubs/restaurants etc.	:	Ceredigion/Carmarthen

It can be seen that regardless of sector, forecasts of increased demand for bilingual skills were particularly prevalent in Ceredigion/Carmarthenshire – and relatively low in South East Wales with the exception of Cardiff and the Vale of Glamorgan for certain sectors.

7. BILINGUAL SERVICES FOR CUSTOMERS

- 7.1 For the clear majority of those interviewed (77%) the likelihood of using a shop, business or service in Wales is not affected by whether or not it uses Welsh and English. Even among those speaking Welsh fluently or fairly well, close to half (52%) were of the same opinion, although 45% of these respondents would be more likely to use the shop or business – compared with 17% overall. Use of both languages is viewed negatively by very few respondents (4%), being highest among non Welsh speaking 16 to 24 year olds at 9%.

Likelihood of using shop/business/service offering both languages

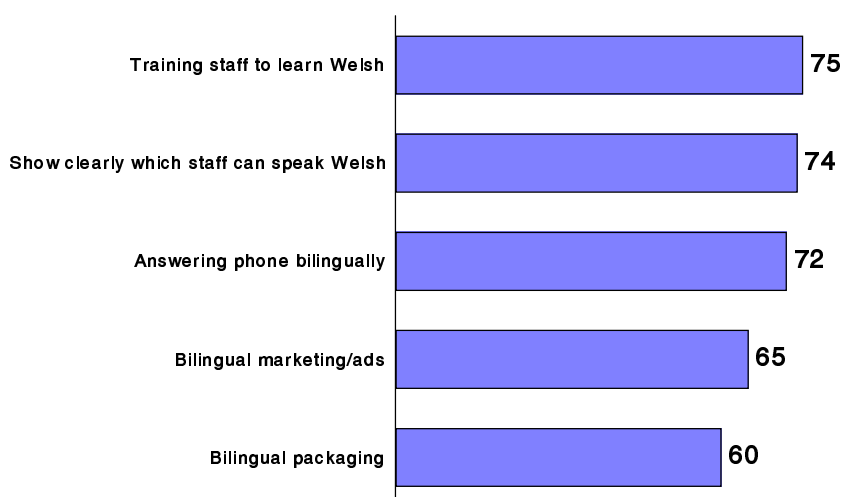


- 7.2 The 4% of the population who appear to be ‘turned off’ by use of both Welsh and English are not, as might be expected, the same 4% who consider that each of the nine types of organisation read out at Q.19 should use less Welsh. Only between one in four and one in five of the former group said the various organisations should employ less Welsh in their dealings with the public.
- 7.3 Most respondents felt the use of Welsh was about right, leaving 20 to 30% in each case who believed the organisation should use more. Essentially the figures varied remarkably little by type of organisation, the list replicating that analysed in section 6 (with the exclusion of Teaching but the inclusion of Voluntary Organisations).
- 7.4 The pattern among Welsh speakers was different to the overall picture but again was much the same regardless of type. Typically, 50-60% felt the organisations should use more Welsh and less than one percent said ‘less’. The highest ‘more’ level, although not significantly so, was 63% for the health service.
- 7.5 Finally within this section respondents were asked how important certain aspects were if an organisation wants to offer customers a bilingual service (Q.15). An arithmetic mean score has been calculated for each service aspect, by assigning a value of 1 to Important through to 5 for Unimportant. Don’t Knows are excluded and the lower the mean score the greater the importance:

<u>Aspect of service</u>	<u>Total sample</u>	<u>Welsh speakers (fluently/fairly well)</u>
Training staff to learn Welsh	1.95	1.36
Staff badges etc.	2.03	1.45
<u>Bilingual</u>		
Forms/Letters	2.02	1.44
Signs	2.05	1.41
Answering phone	2.11	1.37
Marketing/adverts	2.24	1.53
Websites	2.27	1.65
Packaging	2.41	1.74

7.6 Generally, all of the service aspects are regarded as being of importance in offering a bilingual service but some are perceived as rather more important than others. While one would expect bilingual websites and marketing and advertisements to be regarded as of less importance than training staff to learn Welsh and to answer the phone in the language, the relatively low position of bilingual packaging is surprising. This is particularly so compared with the importance attached to bilingual forms, letters and signs.

Importance of aspects of bilingual service **% Important/fairly important: selected aspects**



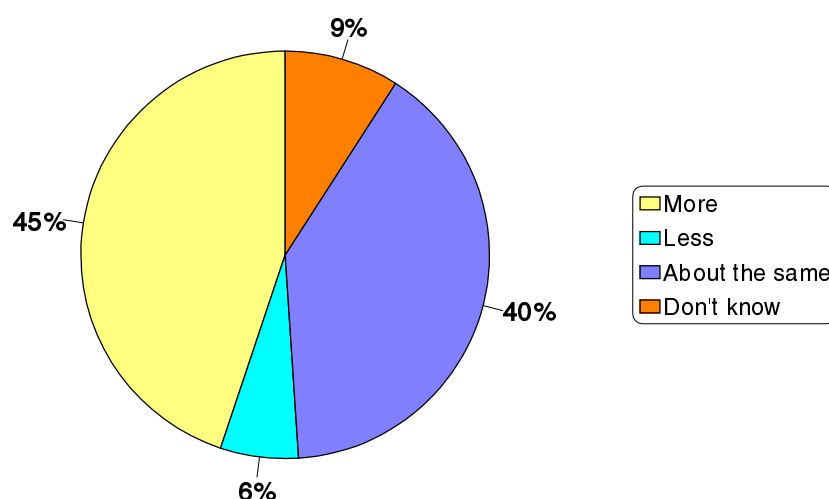
7.7 While noting that bilingual packaging is perceived as the least important of all the aspects covered, both overall and among Welsh speakers in particular, it is still the case that 60% of the total sample (and 82% of Welsh speakers) think it is important.

7.8 Every aspect is regarded as more important by Welsh speakers than by the sample as a whole but with the exception of 'answering the phone bilingually', which is seen as important as 'training staff to learn Welsh' by this group, the relative importance of the different services echoes the pattern for the total sample.

8. EDUCATION IN WELSH

- 8.1 Approaching half of those interviewed (45%) consider there should be more bilingual education than there is now, with very few (6%) believing there should be less. Differences in response between those living with children aged 2 to 16 and those without were slight: 41% of those with children and 47% of those not living with children said there should be more, a difference which is not statistically significant.

More or less bilingual education required



- 8.2 The comparable proportions among non Welsh speakers were 42% more and 7% less and among fluent Welsh speakers 62% more and 1% less. Differences by region were less marked, the highest 'more' percentage being noted in South West Wales (52%) and the lowest in the North West (35%). ABC1 respondents felt broadly the same as C2DE's on this issue, albeit the 'less' proportion was twice as high for ABC1's (8%) as C2DE's.
- 8.3 A further question asked for approval or disapproval of the idea that more English medium schools in 'this area' should teach some subjects in Welsh. Overall there was net approval of + 19% for this idea (proportion approving less those disapproving) but as one would expect there were some differences by area and demographic group. Net scores are shown below:

	<u>Net Score</u>
North East	+ 9
South East	+ 5
South West	+ 43
North West	+ 38

With children (2 – 16 years)	+ 8
No children	+ 23
ABC1	+ 20
C2DE	+ 18

- 8.4 Leaving aside Welsh speakers (for whom the Net score was + 63) but looking at the regions as a whole, there is a clear difference of view in the east of Wales compared with the west. Those respondents who actually have children are significantly less inclined to warm to the idea but there is no variation in response that can be linked with social class in broad terms. Among AB's specifically however, the net score is -10, with nearly half (46%) disapproving.
- 8.5 About one in three (29%) of respondents had children aged 2 to 16 living at home with them, in the majority of cases their own children, and these children totalled 613, following weighting, or just under 2 per respondent with children. Of these, 11% spoke Welsh most or all of the time, 80% English most or all of the time and 9% about half and half. For those children (83) living with Welsh speaking respondents (fluently or fairly well) the corresponding proportions were 64%, 22% and 14%.

Welsh Medium Schools/Playgroups

- 8.6 All respondents, whether or not they had children aged 2 to 16, were asked whether they would send (or had sent) any children they have (or had) to several Welsh medium educational establishments: playgroups, primary schools and secondary schools. The result, in overall terms, can be summarised as follows:

	<u>Playgroups</u>	<u>Primary Schools</u>	<u>Secondary schools</u>
	%	%	%
Experience of (already do/did)	15	18	14
Definitely would	23	26	26
Probably/possibly would	26	24	25
No, would not	27	24	25
Not sure	8	8	9

- 8.7 Close to a quarter of the sample would not contemplate sending their children to a Welsh medium school, the main reason given in each case being that they would prefer their children to be educated in English.

- 8.8 Shown below is the situation as far as Welsh medium playgroups are concerned, firstly for those with children currently aged 2 to 4, then for all those with children of any age (2-16) and finally for those with no children:

	<u>Aged 2-4</u>	<u>Any children</u>	<u>No children</u>
	%	%	%
Already do/did	44	31	9
Definitely would	6	8	29
Probably/possibly would	20	22	28
No would not	29	37	23
Not sure	2	2	10

- 8.9 The 'No, I would not' proportion is higher for those with children than not, the main reasons other than preferring the child to be educated in English (64%) being 'I don't speak Welsh at all' (8%), the partner doesn't speak Welsh (6%) and the absence of a playgroup near by (5%).

- 8.10 A similar picture is shown for Welsh medium (or bilingual) primary schools:

	<u>Aged 5-11</u>	<u>Any children</u>	<u>No children</u>
	%	%	%
Already do/did	34	35	11
Definitely would	13	14	30
Probably/possibly would	16	18	27
No, would not	33	31	21
Not sure	4	2	10

Just under half of parents either already do or definitely would send their children to a Welsh medium primary school. For those without children the proportion is nearer 40%. Again, those who would not do so figure more prominently among the actual parents – one in three compared with one in five of the childless respondents. The reasons given for not doing so echo those seen for playgroups.

8.11 Finally, the situation pertaining to Welsh medium or bilingual secondary schools is shown below:

	<u>Aged 12-16</u>	<u>Any children</u>	<u>No children</u>
	%	%	%
Already do/did	41	23	11
Definitely would	10	19	28
Probably/possibly would	14	21	26
No, would not	31	32	23
Not sure	4	5	11

Experience of Welsh medium secondary schools within the sub sample of respondents with children in the 12 to 16 year old bracket is relatively high at 41%. As with primary schools and playgroups close to one third of parents would not send their children to such a school, compared with 20 – 25% of respondents without children.

8.12 Over two thirds of those saying ‘No’ (68%) would prefer their older children to be educated in English and even among Welsh speakers this reason for responding negatively is (once again) the main one given. However, relatively few respondents speaking Welsh would not send any children they had to Welsh medium educational establishments (Playgroup 5%, Primary schools 3% and Secondary schools 6%) so the bases are very small.