

Welsh language use in Wales, 2013-15



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1. Executive summary

1.1. Key results

Both the percentage and the number of fluent Welsh speakers are fairly similar to those in the Welsh Language Use Surveys of 2004-06, although 130,700 more people now say that they speak Welsh but not fluently.

- 11 per cent of people aged three and over living in Wales can speak Welsh fluently; 12 per cent could speak Welsh fluently in 2004-06.
- There was an increase in every age group in the number of those who stated that they could speak Welsh but not fluently, but there was a substantial increase amongst the 3 to 15 and 16 to 29 age groups.
- Almost half of all Welsh speakers consider themselves fluent Welsh speakers and 21 per cent are able to speak a fair amount of Welsh. In 2004-06, 58 per cent of Welsh speakers stated that they were fluent, and 21 per cent stated that they spoke a fair amount of Welsh.
- The highest concentrations of fluent Welsh speakers are found in local authority areas in west Wales, with the highest concentration in Gwynedd, the Isle of Anglesey, Ceredigion and Carmarthenshire.
- However, some of the largest decreases in the number of fluent Welsh speakers since 2004-06 were seen in areas with the highest concentration of Welsh speakers. This reflects the decrease in the number of Welsh speakers in those areas noted in the 2011 Census.
- In contrast, the largest increases in the number of fluent Welsh speakers since 2004-06 were seen in Cardiff and Rhondda Cynon Taf, with 7,100 more fluent Welsh speakers in Cardiff and 5,300 more in Rhondda Cynon Taf.

The percentage of people in Wales who speak Welsh daily has not changed since the Welsh Language Use Surveys of 2004-06, and there is a clear link between fluency and frequency of Welsh language use.

- 13 per cent of people aged three and over speak Welsh daily. 13 per cent also spoke Welsh daily according to the Welsh Language Surveys of 2004-06.

- Just over half of Welsh speakers speak Welsh daily; almost one in five speak Welsh every week.
- Fluent Welsh speakers speak Welsh more often than non-fluent Welsh speakers. 84 per cent of fluent Welsh speakers speak Welsh daily.
- The highest concentration of Welsh speakers who speak Welsh daily was found in local authority areas in west Wales, with the concentration at its highest in Gwynedd, the Isle of Anglesey, Ceredigion and Carmarthenshire. These areas contain the highest percentages of Welsh speakers and are therefore likely to provide more opportunities for Welsh speakers to use the language often.
- The largest decrease in the number of people speaking Welsh daily since 2004-06 was found in areas with the highest concentration of Welsh speakers. This reflects the decrease in the number of Welsh speakers in those areas noted in the 2011 Census.
- There was a substantial increase in the number of people speaking Welsh daily in south-east Wales, especially in Cardiff.

Young Welsh speakers are more likely to have learnt to speak Welsh at school than anywhere else. Older Welsh speakers are more likely to have learnt Welsh at home as a young child than anywhere else.

- 43 per cent of Welsh speakers have learnt Welsh at home as a young child, 11 per cent at nursery school, 25 per cent at primary school and 15 per cent at secondary school.
- The percentage of people who have learnt to speak Welsh at home as a young child varies from 21 per cent of young people aged 3 to 15 to 79 per cent of people aged 65 and over.
- The percentage of people who have learnt Welsh at school also therefore varies considerably according to age, from 79 per cent of children and young people aged 3 to 15 to 13 per cent of people aged 65 and over. The likely reason for this is the substantial change in the Welsh-medium education sector over the past fifty years, with an increase in the number of pupils learning through the medium of Welsh and in the number of Welsh-medium schools which have opened across Wales.
- Welsh speakers who have learnt Welsh at home as a young child are more likely to be fluent than those who have learnt to speak the language at school.

Young people are more likely than older people to have received their education only or mainly through the medium of Welsh.

- The proportions of adults who have attended a nursery, primary or secondary school where the language of education was only or mainly Welsh is higher for those under the age of 45 than for those aged 45 and over. However, it should be borne in mind that Welsh-medium education was not available to the same extent as it is today when people aged 45 and over were in school.
- The proportion of Welsh-speaking adults whose nursery, primary or secondary education was only or mainly through the medium of Welsh is much higher for those who are fluent, compared to those who are not fluent.

Young people are more likely to always speak Welsh at school than with their friends or at home

- 21 per cent of all Welsh speakers always or almost always speak Welsh at home. This rises to 43 per cent amongst fluent Welsh speakers. This percentage increases steadily with age, from 29 per cent of young people aged 3 to 15, to 56 per cent of people aged 65 and over.
- 67 per cent of young people aged 3 to 15 who are fluent in Welsh always, or almost always, speak Welsh at school. Only 26 per cent of this group always, or almost always, speak Welsh with their friends.
- Fewer than half of those who have learnt to speak Welsh at home, whether fluent or not fluent, always or almost always use Welsh at home.
- 57 per cent of fluent Welsh speakers have used Welsh in their last conversation with someone who is not related to them.

References below to Welsh language use on digital media includes the use of Welsh always or almost always, Welsh mainly, or roughly equal use of Welsh and English on digital media. It's possible that respondents that stated that they use 'mainly English' or 'always/almost always English' also use some Welsh. However, as it is not possible to know for certain that it is Welsh (and not any other language) that is used along with English in these cases; these two groups have not been included in the analysis.

Just over a quarter of all Welsh speakers who text use at least as much Welsh as English to send text messages from a mobile phone to friends.

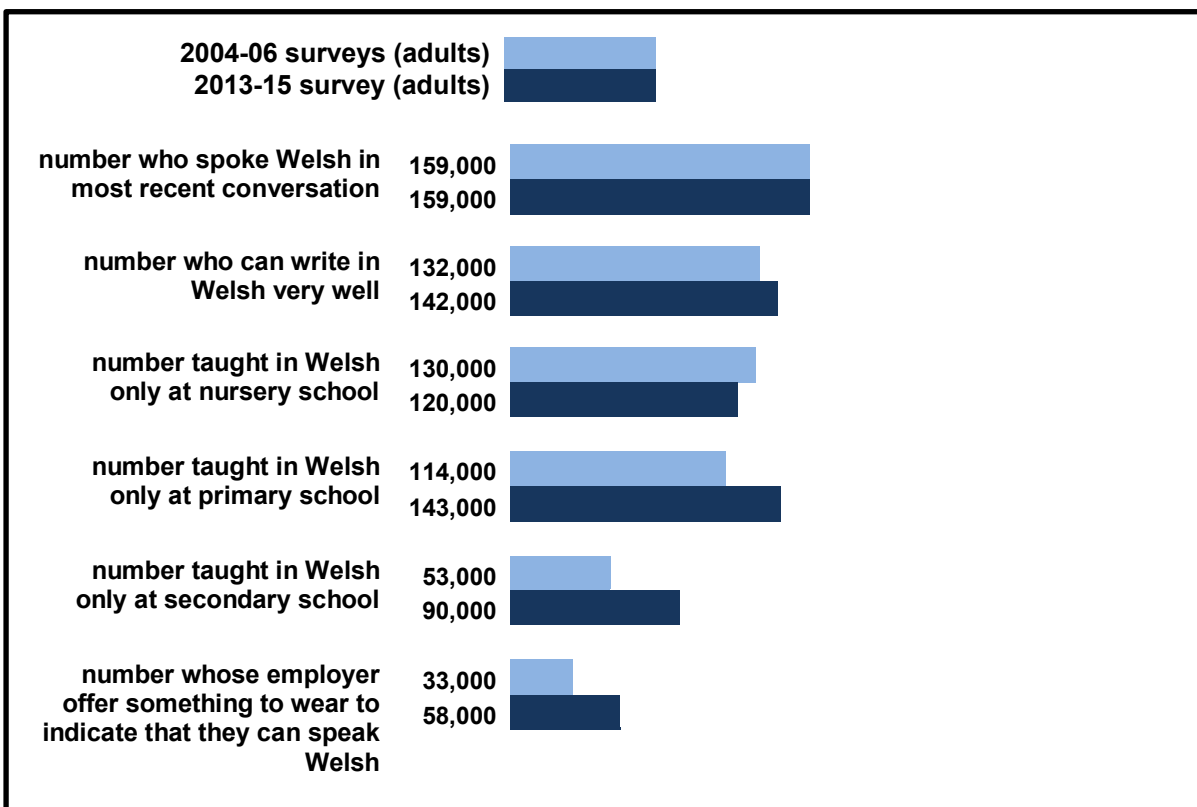
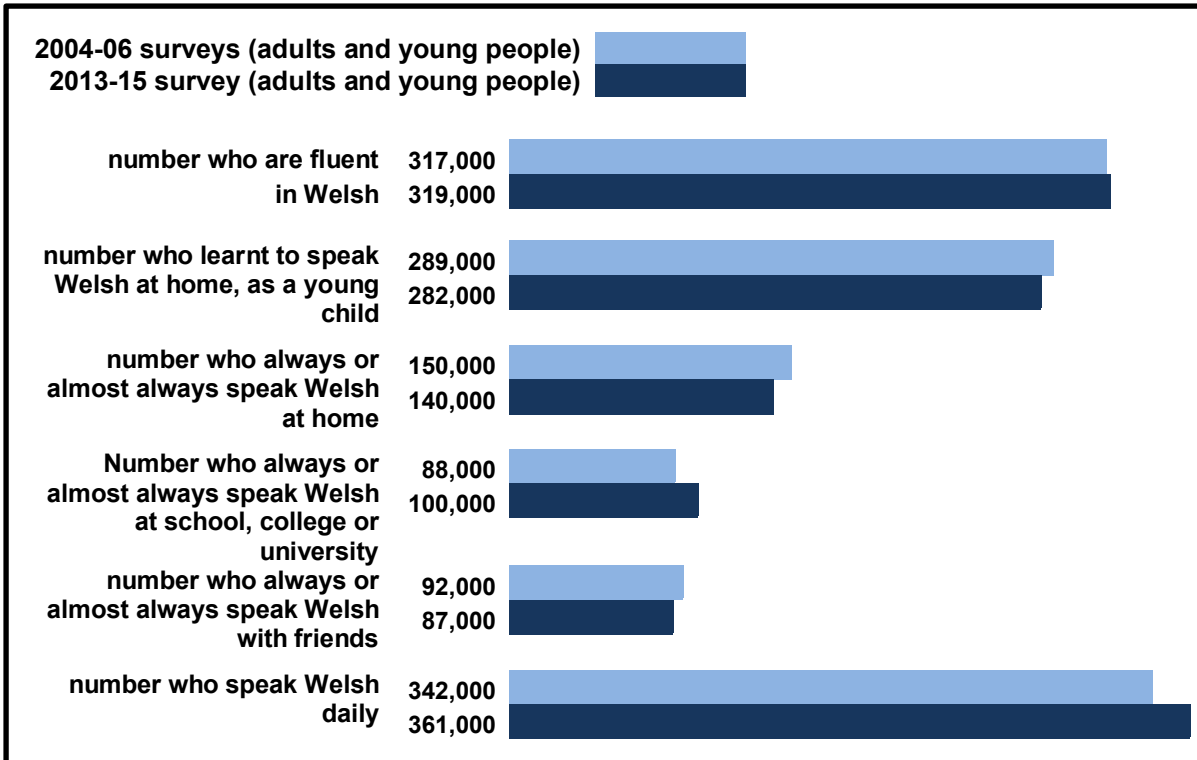
- This increases to just over a half of fluent Welsh speakers who use at least as much Welsh as English when sending text messages.
- 18 per cent of all Welsh speakers aged 16 and over who use Facebook do so at least as much in Welsh as in English, whilst 12 per cent use at least as much Welsh as English on Twitter.

Just over half of Welsh speakers try to use Welsh, at least occasionally, when dealing with public organisations.

- Welsh speakers who speak the language daily are twice as likely to try to use Welsh when dealing with public organisations as those who speak Welsh less often.
- The majority of those who try to use Welsh occasionally with public organisations succeed at least sometimes when using Welsh, for example by speaking to someone in Welsh or obtaining materials in Welsh.
- Of those who always try to use Welsh with public organisations, just over half feel that they always or almost always succeed.
- Nine in ten Welsh speakers who always speak Welsh with people from outside the company or organisation try to use Welsh with public organisations at least sometimes.

1.2. Comparisons with the Welsh Language Use Surveys of 2004-06

The following diagrams show the differences between the numbers of people who gave specific responses to some of the questions in the 2004-06 and 2013-14 Welsh Language Use Surveys. Small differences are unlikely to be significant (in neither the statistical nor the everyday meaning of the word).



The diagrams show that the number of fluent Welsh speakers has remained fairly consistent, while there has been an increase in the number of Welsh speakers who speak the language daily. There has been a decrease in both the number of Welsh speakers who have learnt to speak the language at home as a young child and in the number that speak the language at home always or almost always. Conversely there has been an increase in both the number of Welsh speakers who have received Welsh-medium primary and secondary school education and in the number that speak the language at school.

2. Background and purpose of the survey

2.1. Background

The Welsh Language Use Survey 2013-15 was commissioned by the Welsh Government and the Welsh Language Commissioner in 2013. The survey was conducted over a period of two years between 2013 and 2015. The results of the first year of the survey (2013-14) were published on 29 January 2015 (Welsh Government and Welsh Language Commissioner 2015a).

The 1992 Welsh Social Survey was the first national survey on the use of the Welsh language. This survey, commissioned by the Welsh Office, asked respondents about their ability to speak Welsh and to what extent they used the language (Welsh Office 1995). The information collected about the Welsh language added to the information which was available through the 1991 Census.

Further research into the use of the Welsh language was carried out on behalf of the Welsh Language Board and the findings were published in the *Welsh Language Use Surveys of 2004-06* reports (Welsh Language Board 2008).

The Census, the Annual Population Survey and the National Survey for Wales provide some limited information regarding the number of people who can speak Welsh.¹ There are some examples of small-scale surveys that asked about the use of language. For example, in 2013 BBC Cymru Wales, S4C and the Welsh Government commissioned research to explore the behaviour, attitudes and aspirations of Welsh speakers in terms of their use of Welsh in a range of everyday settings. The research included a quantitative survey of 483 Welsh speakers (BBC Cymru Wales, S4C and Welsh Government 2013).

Research was also carried out on specific issues relating to the Welsh language as part of the Wales Omnibus Survey (Welsh Language Board 2009a, 2009b, 2009c, 2009d and 2009e). However, since the Welsh Language Use Surveys of 2004-06, no large-scale comprehensive information has been collected on people's ability to speak Welsh and on how the language is used in households and communities in Wales.

¹ <https://statswales.wales.gov.uk/Catalogue/Welsh-Language>

2.2. Purpose of the survey

The Welsh Language Use Survey 2013-15 collected information from Welsh-speaking adults and young people in order to ascertain how well they can speak Welsh, how often they speak the language, and where, when and with whom they use it.

The research was commissioned and the report was prepared jointly by the Welsh Government and the Welsh Language Commissioner. The report presents the full results of the Welsh Language Use Survey 2013-15 and no comparisons are therefore made between individual years within this period. This is because the aim of the survey was to obtain information on the Welsh language within this decade, not to assess change over the period of one year. The full results of the survey are based on a sample of 7,175 Welsh speakers, compared to the sample of 3,848 used in the 2013-14 report. This enables us to make additional analyses to those presented in the 2013-14 report.

This report offers an analysis of the language ability of Welsh speakers in Wales and their use of the language in a range of contexts. Where possible, it contains some comparisons with the Welsh Language Use Surveys of 2004-06. The sample size of the survey over two years has allowed analyses at regional level which were not possible based solely on the first year of the survey. It is important to note that local authority area analyses are based on respondents' home location.

This survey is not intended to provide new estimates of the number of people who speak Welsh in Wales. We consider that the 2011 Census is still the main authoritative source of information in this respect (see [Appendix B](#)).

The report will provide an evidence base for the work of the Welsh Government, the Welsh Language Commissioner and others involved in planning the future of the Welsh language. It will also help public, private and voluntary organisations to plan their Welsh language services effectively.

A wide range of organisations outside the Welsh Government and the Welsh Language Commissioner make use of the Welsh Language Use Survey. These include organisations with a specific role in promoting the use of Welsh, for example Welsh Language Initiatives (*Mentrau Iaith*), and also:

- **local government** – the statistics are used to develop, monitor and evaluate policies such as local planning policies;
- **public sector bodies** – the statistics are used as contextual information for service planning, to ensure that the services available reflect the linguistic profiles of specific areas;
- **broadcasters** – the statistics aid broadcasters’ understanding of the demographic characteristics of the population and enable them to plan their services for the population;
- **academia** – the statistics are used by academics to understand the sociolinguistic profile of Wales and to undertake research into the position of the Welsh language in Wales;
- **media** – the media sometimes refers to the statistics in the news while reporting on the position of the Welsh language in Wales.

To accompany this report, a series of tables will be published on [StatsWales](#), and the data itself will be deposited in the [UK Data Archive](#) so that others can analyse the data for themselves.

2.3. Policy and context

The Welsh Government’s Welsh Language Strategy 2012-17, *A living language: a language for living*, sets out the Welsh Government’s aspiration to see an increase in the number of people both speaking and using the language in their daily lives. These objectives are set out in six strategic areas: the family, children and young people, the community, the workplace, Welsh language services and infrastructure (Welsh Government 2012a). The Welsh Government’s policy statement, *Moving forward*, builds on the Welsh Language Strategy by considering a number of developments since the publication of the strategy in 2012, focussing on four themes: the economy and the Welsh language, strategic planning, Welsh in the community and changing linguistic behaviour (Welsh Government 2014a).

The Welsh Language Use Survey provides the Welsh Government with information to help it measure the progress made towards achieving some of these objectives, and identifies areas where policy needs to be strengthened and further developed.

Alongside the Welsh Language Strategy, the Welsh Government also has a Welsh-medium Education Strategy (Welsh Government 2012b). The strategy sets out the Welsh Government’s strategic direction for planning and delivering Welsh-medium provision in all

phases of education and training. The findings of this survey will shed light on some aspects which are relevant to the Welsh-medium Education Strategy.

The Well-being of Future Generations (Wales) Act 2015 aims to improve the social, economic, environmental and cultural well-being of Wales which has, amongst its goals, promoting and protecting the Welsh language.

The principal aim of the Welsh Language Commissioner, an independent body established by the Welsh Language Measure (Wales) 2011, is to promote and facilitate the use of the Welsh language. The results from the Welsh Language Use Survey will provide the Commissioner with important evidence on the use of the Welsh language in various situations. One of the main strategic objectives of the Welsh Language Commissioner is to ensure that due consideration is given to the Welsh language in policy development and legislation. Achieving this depends largely on supportive evidence and data. The Welsh Language Use Survey contributes to the evidence base on the state of the Welsh language. The evidence from the survey will also contribute towards the Commissioner's quinquennial report on the position of the Welsh language in Wales.

The Welsh Language Measure (Wales) 2011 provides for the establishment of a new framework of statutory duties in relation to the Welsh Language, in the form of standards. Welsh Ministers, county councils and county borough councils, and national park authorities in Wales will have to comply with the first set of standards from March 2016, with a substantial number of other bodies in Wales also having to comply in due course.

The Welsh Language Use Survey provides information for organisations and other users which will be useful when developing policies and planning services in accordance with the Welsh language standards.

The information contained here contributes to the wider evidence base relating to the Welsh language and the use made of it, and adds to sources of information such as the Census and the Annual Population Survey.

3. How was the survey conducted?

It was decided to carry out a Welsh Language Use Survey as an additional part of the National Survey for Wales rather than conduct a separate survey (see [Annex A](#)).² This would ensure that it was cost effective and that the results could be compared to previous surveys if possible. This approach was similar to the one used for the Welsh Language Use Surveys of 2004-06, which were a supplementary element to the Living in Wales Survey. The survey was conducted over a period of two years between April 2013 and March 2015.

The randomly selected adults who took part in the National Survey for Wales were asked to identify all members in their household who could speak Welsh. The Welsh Language Use Survey, a self-completion questionnaire, was subsequently left for each Welsh speaker to complete and return by post. The fieldwork for the Welsh Language Use Survey was conducted from 1st April 2013 to 31st March 2015, on a continuous basis throughout the year.

The questionnaires used for the 2013-15 surveys were developed jointly by the Welsh Language Commissioner and the Welsh Government. The majority of the questions included were unchanged from the Welsh Language Use Surveys of 2004-06. However, some new questions were introduced, for example around the use of Welsh for texting, emailing and on social media. There were two kinds of questionnaire: one for adults (aged 16 and over) and one for children and young people (aged from 3 to 15). The questionnaire for young people was completed either by the parent or by the young person if the young person was over 12 and they wanted to complete it. Both questionnaires could be completed in Welsh or English. Copies of both questionnaires can be found in [Annex C](#).

Both the adult and young person questionnaires had questions on:

- understanding, speaking, reading and writing Welsh;
- ability in spoken Welsh (from being fluent to being able to just say a few words);
- where Welsh was learnt;
- language used in a range of everyday situations;
- frequency of speaking Welsh;
- language used for sending digital messages and using social media;

² In November 2014 it was decided to combine the National Survey for Wales, the Welsh Health Survey, the Arts in Wales Survey, the Welsh Outdoor Recreation Survey and the Active Adults Survey into a single survey. The new survey will be called the National Survey for Wales and will start in 2016-17.

- attendance at a cultural or sporting event conducted in Welsh.

The adult questionnaire had additional questions on:

- parents' ability in spoken Welsh;
- language of the most recent conversation (outside the family);
- ability to write in Welsh;
- language of education at various stages;
- use of Welsh when dealing with public organisations;
- whether more comfortable using Welsh or English;
- opportunity to use Welsh at work and employer's attitude to the language.

The young person questionnaire (for 3 to 15 year olds) had additional questions on:

- ability of family members to speak Welsh;
- language school subjects taught in;
- whether the young person or parent completed the questionnaire.

When analysing the results of the survey, it should be remembered that some responses are inherently subjective. If two people have exactly the same spoken Welsh language ability, one person may consider themselves to be fluent while the other may consider that they can speak only a fair amount of Welsh. In particular, small apparent differences in the data should not be made to appear more important than they are.

It should also be remembered that the young person questionnaires (for 3 to 15 year olds) were completed by parents, or by the young people if they were over the age of 12 and wanted to complete the questionnaire themselves. A parent's assessment of their child's Welsh language ability and use can be quite subjective, as can their assessment of their own Welsh language ability and use.

The United Kingdom Statistics Authority has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the Code of Practice for Official Statistics.

Designation can be broadly interpreted to mean that the statistics:

- meet identified user needs;
- are well explained and readily accessible;
- are produced according to sound methods; and

- are managed impartially and objectively in the public interest.

Once statistics have been designated as National Statistics it is a statutory requirement that the Code of Practice shall continue to be observed.

3.1. Plans for the future

The Welsh Language Use Survey 2013-15 was commissioned in order to add to the information in the 2011 Census (in a similar way to the language use surveys of 1992 and 2004-06). As yet, there are no plans to repeat the survey in the near future. The Welsh Government and the Welsh Language Commissioner will consider user needs when making any decisions about commissioning a continuation of the survey. When presenting the results of the interim report, users were asked about future surveys. Most users wanted the survey updated within one to five years. The need to update this data must be considered in the light of available resources and other research priorities during this period.

Although the National Survey for Wales is to be combined with four other surveys from 2016-17 onwards, it will be possible to continue with the current system of conducting follow-up surveys on specific subjects as supplementary elements.

If you would like to receive the latest information on statistics relating to the Welsh language, please contact the [Welsh Government](#) or the [Welsh Language Commissioner](#).

3.2. Responsibilities

The Welsh Government and the Welsh Language Commissioner are jointly responsible for producing these statistics, including statistical analysis and dissemination. A statistics and research joint working framework exists between the two organisations, and this outlines how they share information and identify opportunities for collaboration in these areas (Welsh Government and Welsh Language Commissioner 2015b). However, the Welsh Government's Chief Statistician has responsibility for the statistics and the content of this report.

This report is available on the Welsh Government's website and on the Welsh Language Commissioner's website.

3.3. International context

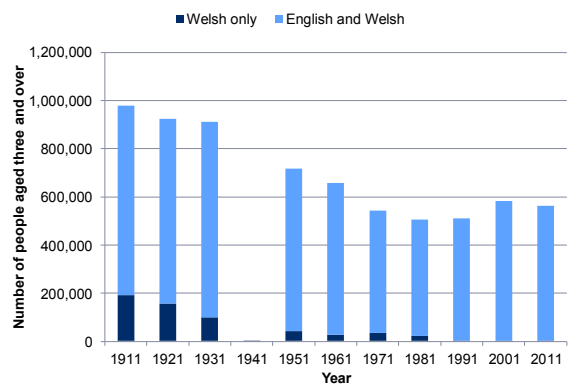
This report contributes to the wider picture of how languages are used in bilingual contexts. The Welsh language is part of the European Charter for Regional Languages or Minority Languages. Information about the use of Irish Gaelic in the Republic of Ireland and Northern Ireland is contained in *Attitudes towards the Irish Language on the Island of Ireland* (The Economic and Social Research Institute and *Foras na Gaeilge* 2015), and the results of a survey on attitudes towards Scottish Gaelic, and use of the language, were published in 2011 (Scottish Government /*Riaghaltas na h-Alba* 2011). Information about using Scottish Gaelic at home is also available in *Scotland's Census 2011: Gaelic* report (National Records of Scotland 2015). For some years, surveys containing questions on language use have been an important feature of sociolinguistic research in the autonomous communities of Spain. Information on ability and use of the Basque language (*euskara*) is included in the 2011 Sociolinguistic Survey (*Eusko Jaurlaritza* 2013) and in *Mapa Soziolinguistikoa 2011* (*Eusko Jaurlaritza* 2014), and the most recent *Enquesta d'usos lingüístics de la població* was conducted in Catalonia in 2013 (*Generalitat de Catalunya* 2014). A module on ability and use of the *galego* language was added to the annual living conditions survey in Galicia in 2013 (*Instituto Galego de Estatística* 2014).

4. How many people in Wales speak Welsh?

The aim of the Welsh Language Use Survey was to offer a picture of the fluency levels of Welsh speakers and how they use the language. We consider the 2011 Census to be the main source of information on the number of people who can speak Welsh.

Over the last century, the Census has shown a decrease in the number of Welsh speakers from almost a million in 1911 to half a million in 1981, with no monolingual Welsh speakers left by the end of the twentieth century. There are many different complex social reasons for this decline, and these have been discussed extensively in the literature (see, for example Welsh Language Board 2012). More recently, an increase was recorded in 2001 which halted the continuous decline observed in the previous century. Although the figure of 19.0 per cent, or 562,000 Welsh speakers, in 2011 had decreased from 2001, it was higher than in 1991 (Welsh Government 2012c).

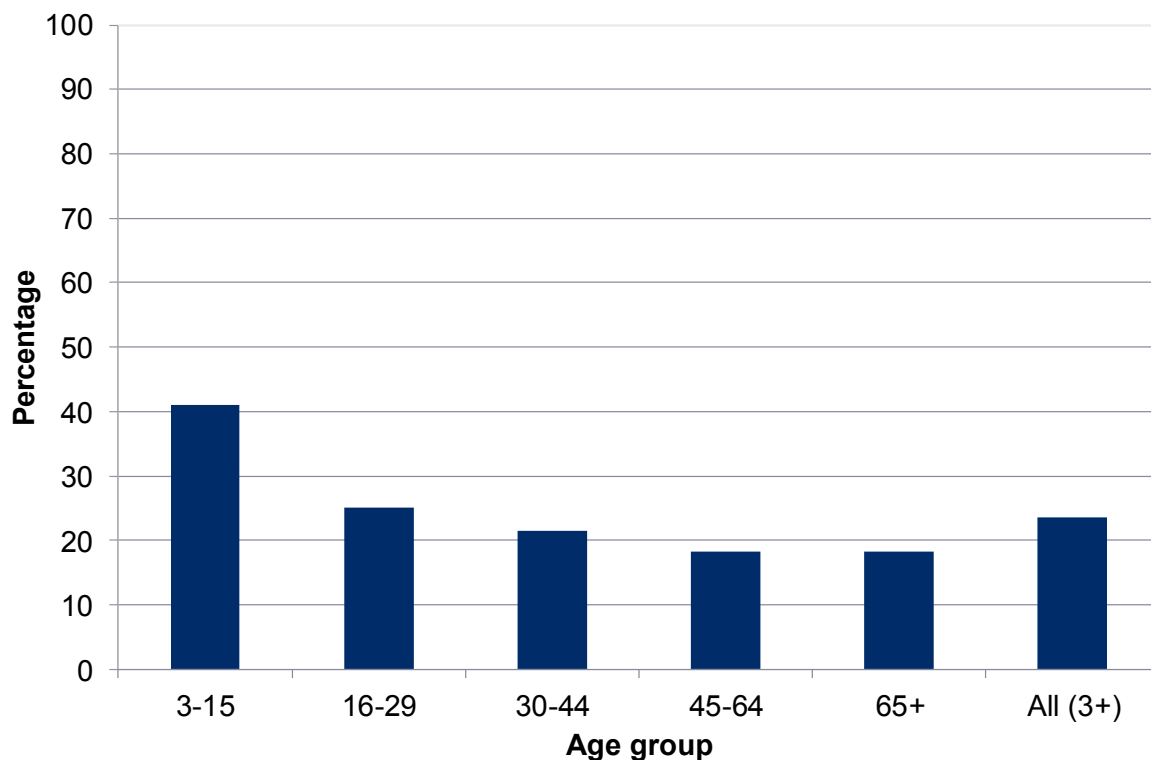
Figure 1: The number of people aged three and over able to speak Welsh, 1911-2011



As is the case with other household surveys, estimates of the numbers and percentages of Welsh speakers in the Welsh Language Use Survey are higher than the Census results. There are several possible reasons for this, which are considered in detail in [Annex B](#). Using data collected from the Welsh Language Use Survey, further research could be carried out in the future on differences between the Survey and the Census to better understand the differences between individuals' responses.

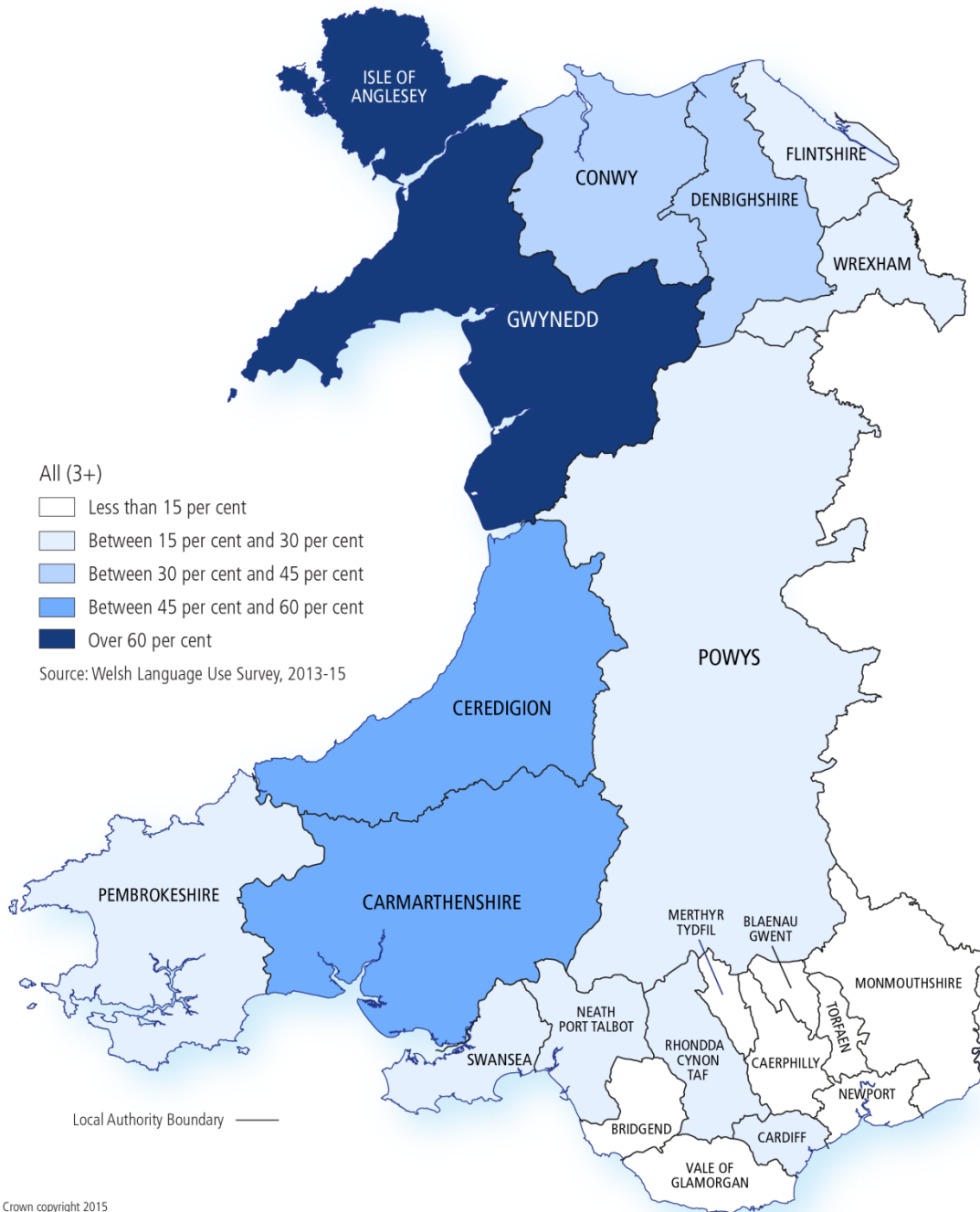
According to the Welsh Language Use Survey 2013-15, 24 per cent of people aged three and over were able to speak Welsh. The percentage of Welsh speakers decreased with age; it was at its highest amongst the 3 to 15 age group, 41 per cent, and at its lowest amongst the 45 to 64 age group, 18 per cent. The figure below shows the percentage of the population able to speak Welsh by age.

Figure 2: Percentage of people aged three and over who speak Welsh by age



The percentage of people able to speak Welsh also varied between local authority areas. The map below shows the percentage of people able to speak Welsh by local authority area.

Figure 3: Percentage of people who are able to speak Welsh by local authority area



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The highest concentration of Welsh speakers was found in west Wales, especially in Gwynedd, the Isle of Anglesey, Ceredigion and Carmarthenshire. The lowest percentage of people able to speak Welsh was found in south-east Wales.

5. How well can people speak Welsh?

5.1. Main findings

Both the percentage and the number of fluent Welsh speakers are fairly consistent with those in the Welsh Language Use Surveys of 2004-06, although 130,700 more people now say that they speak Welsh but not fluently.

- 11 per cent of people aged three and over living in Wales can speak Welsh fluently; 12 per cent could speak Welsh fluently in 2004-06.
- There was an increase in every age group in the number of those who stated that they could speak Welsh but not fluently, and there was a substantial increase amongst the 3 to 15 and 16 to 29 age groups.
- Almost half of all Welsh speakers consider themselves fluent Welsh speakers and 21 per cent are able to speak a fair amount of Welsh. In 2004-06, 58 per cent of Welsh speakers stated that they were fluent, and 21 per cent stated that they spoke a fair amount of Welsh.
- The highest concentrations of fluent Welsh speakers are found in local authority areas in west Wales, with the highest concentration in Gwynedd, the Isle of Anglesey, Ceredigion and Carmarthenshire.
- However, some of the largest decreases in the number of fluent Welsh speakers since 2004-06 were seen in areas with the highest concentration of Welsh speakers. This reflects the decrease in the number of Welsh speakers in those areas noted in the 2011 Census.
- In contrast, the largest increases in the number of fluent Welsh speakers since 2004-06 were seen in Cardiff and Rhondda Cynon Taf, with 7,100 more fluent Welsh speakers in Cardiff and 5,300 more in Rhondda Cynon Taf.

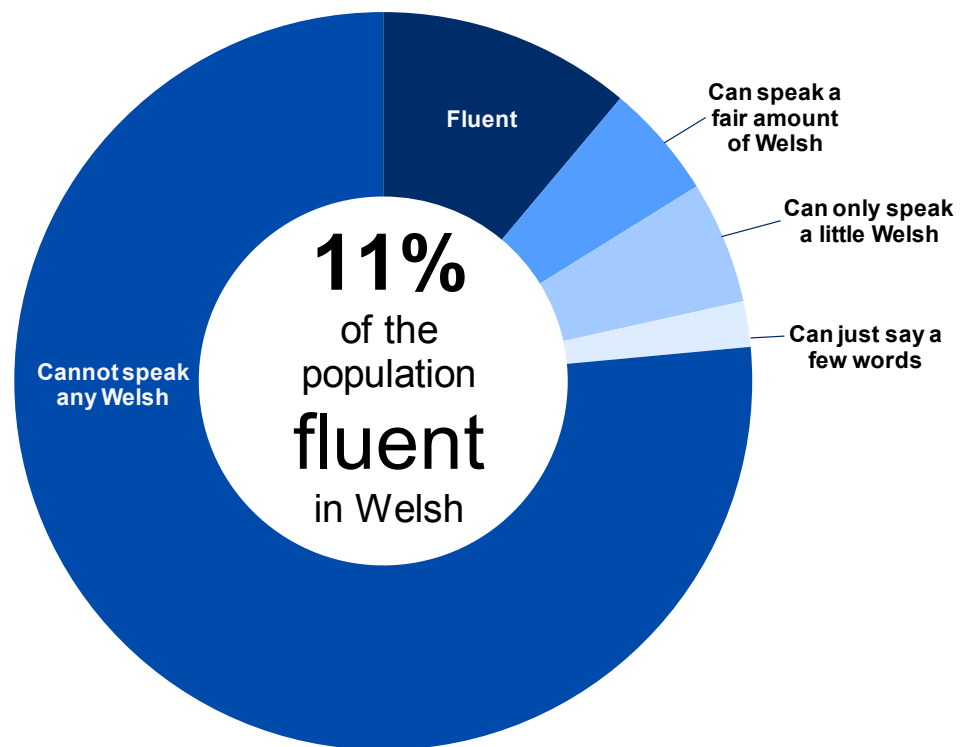
5.2. Fluency in Welsh

Adults and young people aged three and over were asked to best describe their ability to speak Welsh. The information on fluency adds to our understanding of people's ability to speak Welsh, and differentiates between the ability levels of those individuals to speak Welsh.

Respondents may have interpreted their fluency in Welsh in many ways when answering this question. A number of factors are likely to have influenced their answers, including confidence and a tendency to compare personal linguistic ability to the linguistic ability of other Welsh speakers in the locality. Two people with the same ability to speak Welsh may have answered this question differently. This is a common issue in research studies such as this that ask individuals to assess their own fluency.

In order to provide the contextual information for the rest of the report, the figure below presents the results of the question on fluency as a percentage of the whole population.

Figure 4: Percentage of people who speak Welsh by fluency

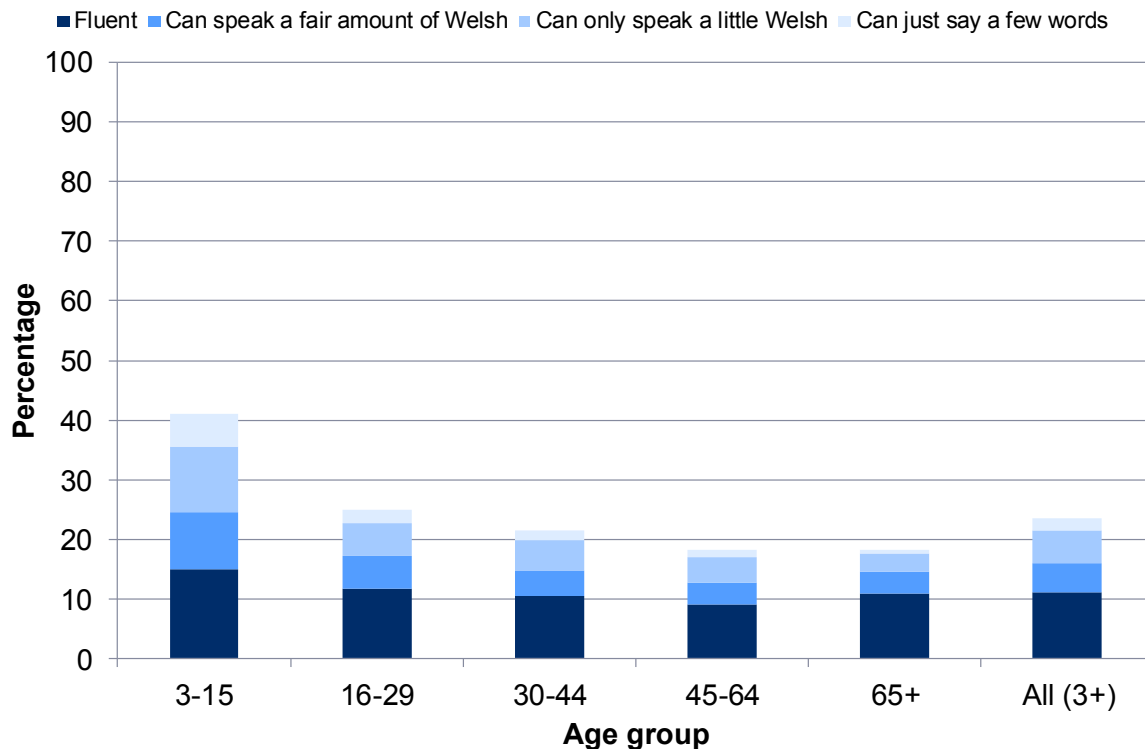


11 percent of all people aged three and over living in Wales were able to speak Welsh fluently. This represented around 318,800 people. 12 per cent of people stated that they could speak Welsh but not fluently.

Both the percentage and the number of people who stated that they are fluent Welsh speakers have remained relatively constant since 2004-06. 12 per cent of all people aged three and over were able to speak Welsh fluently in 2004-06, which represented 317,300 people.

The figure below shows how the population's ability to speak Welsh varied according to age.

Figure 5: Percentage of people who speak Welsh by fluency and age



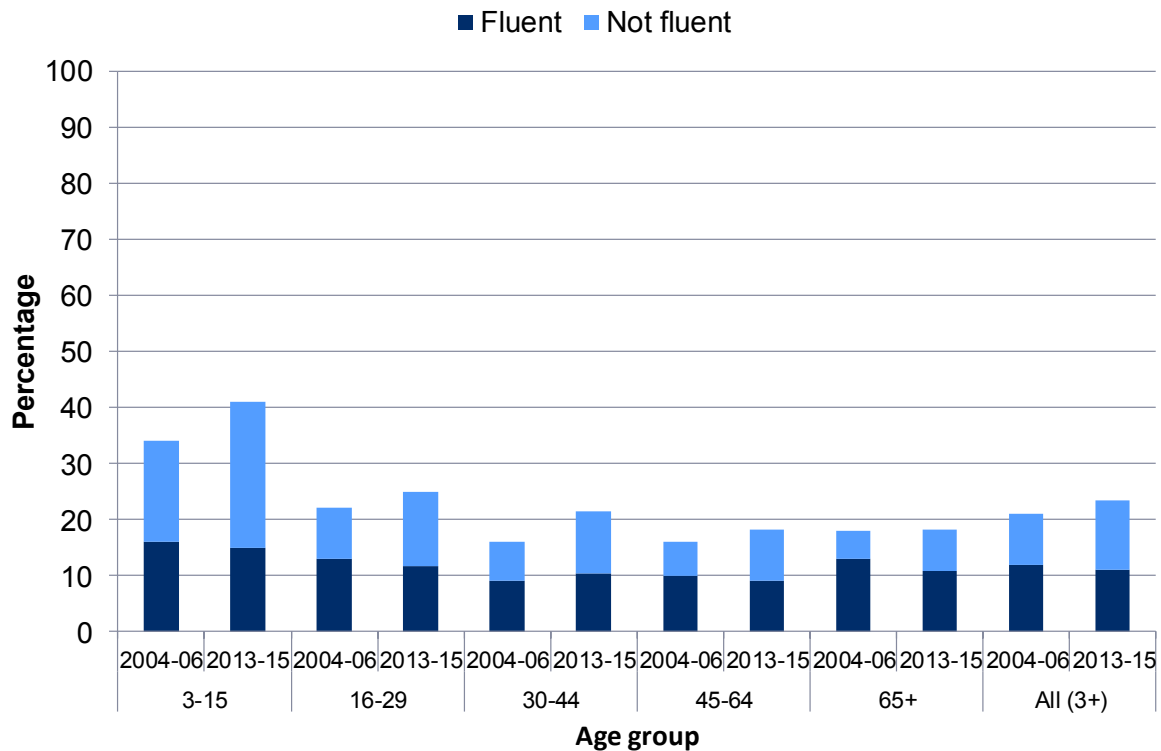
The percentage of people who were fluent in Welsh tended to decrease with age, from 15 per cent of the 3 to 15 age group to 9 per cent of the 45 to 64 age group. The percentage of people aged 65 and over who were fluent was slightly higher than the percentage of the 30 to 44 and 45 to 64 age groups. The percentage of people able to speak Welsh but not fluently was also highest in the 3 to 15 age group, and was at least twice as high as any of the other age groups.

One specific issue needs to be considered when analysing the fluency of very young children. Some parents may have stated that their children were not fluent because their speaking abilities in any language were not fully developed at the time. On that basis they may have stated that their children were not fluent in Welsh. However, others might have stated that their children were totally fluent, accepting the limitations on their linguistic ability based on age. This issue is not unique to the Welsh language. These trends are likely to be most relevant to the youngest children in the 3 to 15 age group.

The figure below compares the percentages of people who were fluent and who were not fluent with the 2004-06 survey percentages based on age. Those who were not fluent

include Welsh speakers who stated that they could speak a fair amount of Welsh, those who could speak a little Welsh and those who could just say a few words in Welsh.

Figure 6: Percentage of people who speak Welsh by fluency, age and survey



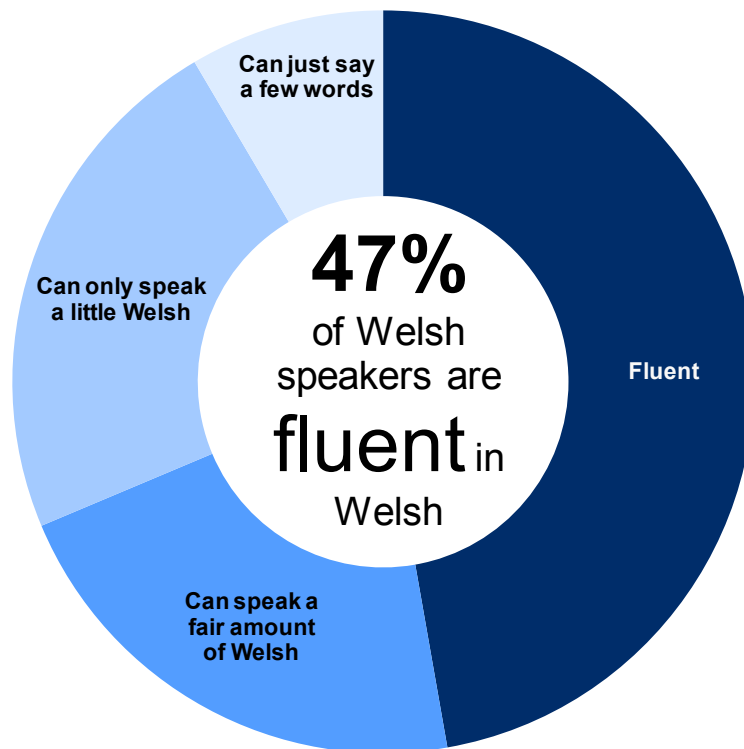
Whilst the percentage of people who were fluent has remained relatively constant between the two surveys in all age groups, the percentage of people who speak Welsh, but not fluently, has risen between the two surveys in all age groups, from 9 per cent of people in 2004-06 to 12 per cent of people in 2013-15. The largest increase was seen in the 3 to 15 age group, which increased from 18 per cent in 2004-06 to 26 per cent in 2013-15.

The number of fluent Welsh speakers has remained relatively constant between the two surveys, with an increase of almost 1,600. However, the number of Welsh speakers who were not fluent has increased substantially between the two surveys, up by almost 130,700.

The remainder of this section analyses the characteristics of those who stated that they could speak Welsh.

The figure below shows the fluency levels of Welsh speakers only.

Figure 7: Percentage of Welsh speakers by fluency



47 per cent of Welsh speakers considered themselves to be fluent in Welsh, whilst 21 per cent could speak a fair amount of Welsh.

The percentage of Welsh speakers who considered themselves to be fluent in Welsh increased with age. The percentage of Welsh speakers who were fluent was at its lowest amongst the 3 to 15 age group, with 36 per cent of them stating that they were fluent. There were more Welsh speakers who were not fluent in this age group than in any other age group. The highest percentage of Welsh speakers who were fluent was found in the 65 and over age group, with three in every five stating that they were fluent.

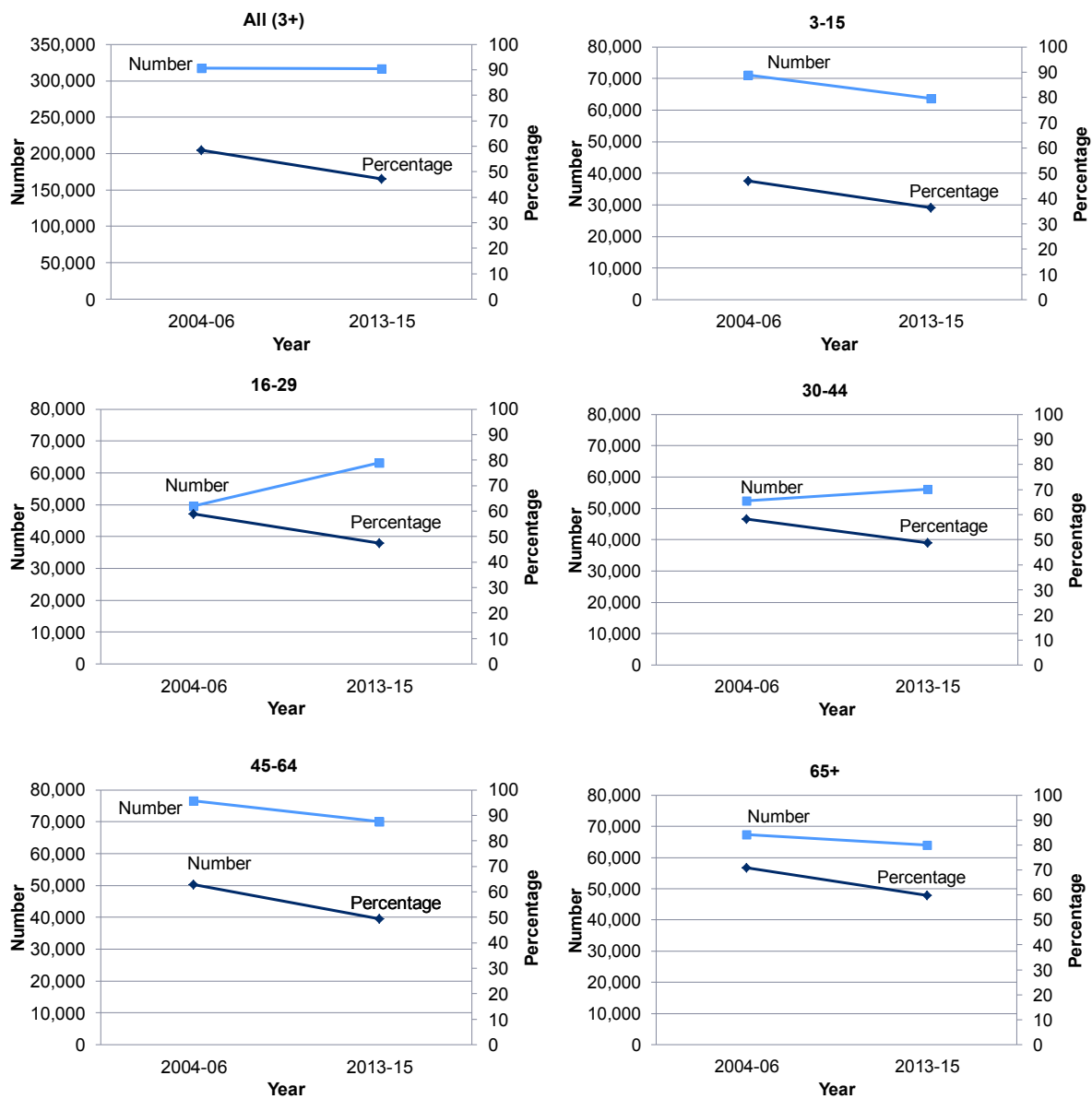
Table 1: Percentage of Welsh speakers by fluency and age

| | Percentage of Welsh speakers who are fluent |
|-----------------|---|
| 3-15 | 36 |
| 16-29 | 47 |
| 30-44 | 49 |
| 45-64 | 49 |
| 65+ | 60 |
| All (3+) | 47 |

The percentage of Welsh speakers who could just say a few words was higher amongst the 3 to 15 age group than amongst any other age group, with 13 per cent of this age group able to just say a few words.

The figure below shows how the numbers and percentages of Welsh speakers who were fluent have changed since 2004-06 by age.

Figure 8: Number and percentage of Welsh speakers who are fluent by age and survey



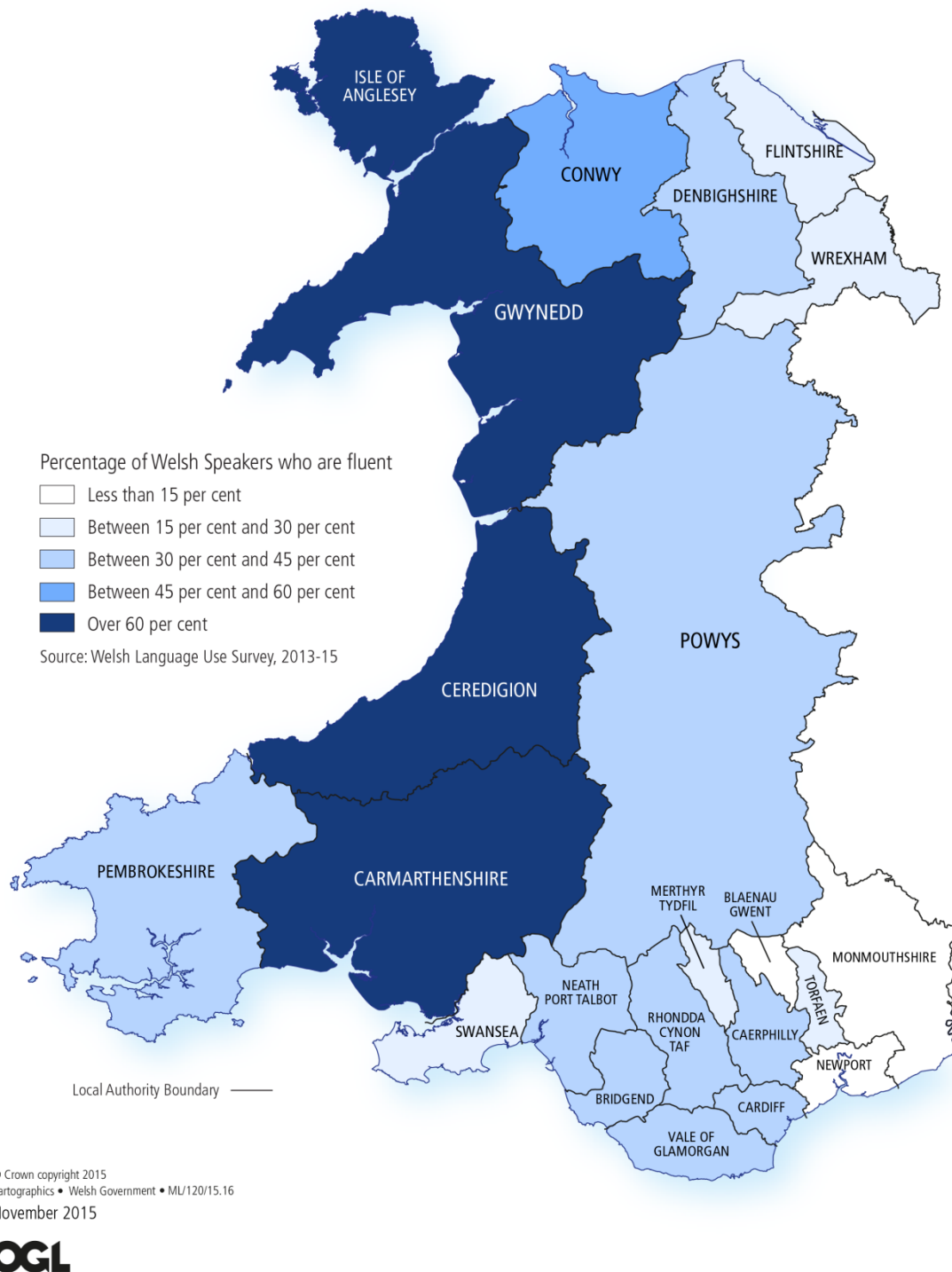
The figure shows that the percentage of Welsh speakers who were fluent has decreased between the two surveys in all age groups. The percentage of Welsh speakers who were fluent decreased from 58 per cent in 2004-06 to 47 per cent in 2013-15. The decrease has been relatively constant amongst all age groups, namely between 9 and 14 percentage points.

However, a study of the numbers of fluent Welsh speakers in all age groups in 2004-06 and 2013-15 reveals a slightly different pattern. Although the percentages decreased amongst

the whole population, there was an increase in the number of fluent Welsh speakers amongst the 16 to 29 and 30 to 44 age groups.

Fluency also varied according to local authority areas. The map below shows the percentage of Welsh speakers who were fluent based on local authority area.

Figure 9: Percentage of Welsh speakers who are fluent by local authority area



The local authority areas with the highest percentages of Welsh speakers also had the highest percentages of fluent Welsh speakers, and are located in west Wales. The percentage of Welsh speakers who are fluent was highest in Gwynedd, where almost four in every five Welsh speakers are fluent.

The lowest percentages of Welsh speakers who were fluent were in the local authority areas which had the lowest percentage of Welsh speakers, namely south-east Wales. The percentage of Welsh speakers who were fluent was lowest in Newport, where fewer than one in ten Welsh speakers was fluent.

There is a link between the number of Welsh speakers in a local authority area and the number of fluent Welsh speakers in that area. Areas with the highest concentrations of Welsh speakers also have the highest concentrations of fluent Welsh speakers. This is possibly because the Welsh language is used often in those areas, thus providing opportunities for people to maintain or develop their fluency in Welsh.

The percentage of Welsh speakers who stated that they could just say a few words was highest in south-east Wales.

The table below shows how the number of fluent Welsh speakers and the number of Welsh speakers who were not fluent has changed since 2004-06 by local authority area.

Table 2: Welsh speakers by fluency and local authority area, 2004-06 and 2013-15

| | Fluent | | | Not fluent | | |
|-------------------|----------------|----------------|--------------|----------------|----------------|----------------|
| | 2004-06 | 2013-15 | Difference | 2004-06 | 2013-15 | Difference |
| Isle of Anglesey | 28,600 | 26,000 | -2,600 | 7,700 | 12,000 | 4,300 |
| Gwynedd | 69,200 | 67,100 | -2,100 | 13,800 | 19,400 | 5,600 |
| Conwy | 19,400 | 17,200 | -2,100 | 13,800 | 18,300 | 4,500 |
| Denbighshire | 14,100 | 12,200 | -2,000 | 11,600 | 16,400 | 4,800 |
| Flintshire | 4,900 | 6,700 | 1,800 | 14,500 | 20,200 | 5,700 |
| Wrexham | 6,600 | 6,000 | -600 | 10,800 | 21,400 | 10,500 |
| Powys | 10,400 | 12,600 | 2,300 | 15,100 | 17,100 | 2,000 |
| Ceredigion | 26,600 | 26,000 | -600 | 11,100 | 13,400 | 2,300 |
| Pembrokeshire | 11,000 | 9,600 | -1,400 | 11,700 | 13,200 | 1,600 |
| Carmarthenshire | 53,600 | 51,600 | -2,000 | 21,200 | 29,100 | 7,800 |
| Swansea | 11,800 | 12,000 | 200 | 11,600 | 28,800 | 17,200 |
| Neath Port Talbot | 11,800 | 9,300 | -2,500 | 8,000 | 13,100 | 5,200 |
| Bridgend | 5,500 | 5,400 | -100 | 5,800 | 12,000 | 6,300 |
| Vale of Glamorgan | 5,000 | 4,400 | -700 | 5,000 | 9,800 | 4,800 |
| Cardiff | 14,800 | 21,800 | 7,100 | 17,300 | 34,000 | 16,700 |
| Rhondda Cynon Taf | 11,200 | 16,600 | 5,300 | 12,500 | 21,300 | 8,700 |
| Merthyr Tydfil | 2,000 | 1,500 | -600 | 1,900 | 4,600 | 2,800 |
| Caerphilly | 5,900 | 6,800 | 1,000 | 5,800 | 14,600 | 8,900 |
| Blaenau Gwent | 900 | 900 | 100 | 5,200 | 5,600 | 400 |
| Torfaen | 1,600 | 2,400 | 800 | 5,700 | 8,000 | 2,300 |
| Monmouthshire | 1,100 | 1,500 | 400 | 7,300 | 10,600 | 3,400 |
| Newport | 1,300 | 1,300 | 0 | 8,200 | 13,300 | 5,100 |
| Wales | 317,300 | 318,800 | 1,600 | 225,600 | 356,300 | 130,700 |

The number of fluent Welsh speakers has decreased in over half the local authority areas (12 out of 22 areas). The largest decreases were in several local authority areas which have the highest percentages of Welsh speakers – there were 2,600 fewer fluent Welsh speakers in the Isle of Anglesey in 2013-15 than in 2004-06. There was an increase in the number of fluent Welsh speakers in several local authority areas in south-east Wales, with the biggest increase in Cardiff – there were 7,100 more fluent Welsh speakers in Cardiff in 2013-15 than in 2004-06. This is similar to the trends seen in the changing number of Welsh speakers in the 2011 Census.

The number of Welsh speakers who were not fluent increased in all local authority areas in Wales. The largest percentage increase was in Caerphilly, Swansea and Merthyr Tydfil

where there were more than twice as many Welsh speakers who were not fluent in 2013-15 than in 2004-06.

The percentage of Welsh speakers that are fluent has decreased in all local authority areas except Powys, Torfaen and Blaenau Gwent. There was a small increase of between 0 and 2 percentage points in these areas.

The largest decrease in the percentage of fluent Welsh speakers was seen in local authority areas in central south Wales, with a decrease of 20 percentage points or more in Merthyr Tydfil, Swansea and the Vale of Glamorgan.

Some of the local authority areas which saw a decrease in the **percentage** of fluent Welsh speakers saw an increase in the **number** of fluent Welsh speakers. In these local authority areas, however, the number of Welsh speakers who are not fluent increased more than the number of fluent Welsh speakers. This explains why the percentage of fluent Welsh speakers has decreased.

6. How well can Welsh speakers write Welsh?

6.1. Main findings

The percentage of Welsh speakers who state that they can write Welsh well or very well has decreased slightly from 67 per cent to 57 per cent since the Welsh Language Use Surveys of 2004-06.

- There is a link between the ability of Welsh speakers to write in Welsh and their spoken fluency. 89 per cent of fluent Welsh speakers state that they can write Welsh well or very well.
- Fluent Welsh speakers aged 16 to 29 are more likely than older fluent Welsh speakers to say that they can write Welsh well.

6.2. The ability to write in Welsh

One question was asked about Welsh speakers' writing ability. The question was specific to adults.

When analysing this information, it must be borne in mind that the respondents were reporting on their own writing ability in Welsh, and that their responses will be subjective to some degree, in the same way that reporting on Welsh speaking ability is subjective to some degree.

In the Welsh Language Use Surveys of 2004-06, 67 per cent of Welsh-speaking adults stated that they could write in Welsh well or very well. This percentage has decreased slightly by 2013-2015, with 57 per cent stating that they can write in Welsh well or very well.

There is a clear link between individuals' fluency levels and their ability to write in Welsh. Fluent Welsh speakers are far more likely to state that they can write well in Welsh than those who are not fluent.

The percentage of fluent Welsh speakers with good or very good writing ability has remained consistent over the years. In 2004-06, 88 per cent of fluent Welsh speakers stated that they

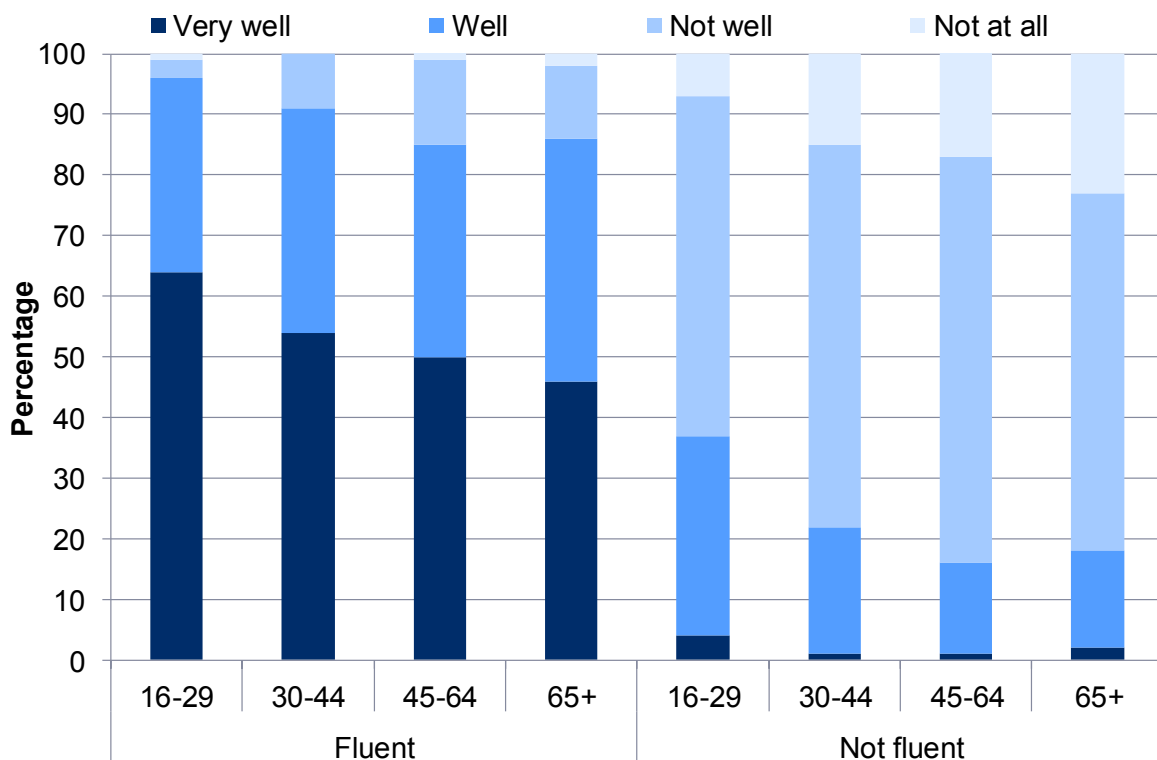
could write well or very well in Welsh, compared to 89 per cent in 2013-2015. Almost a quarter of respondents who were not fluent stated that they could write well or very well.

Slightly more Welsh speakers aged between 16 and 29 who were fluent stated that they could write well or very well in Welsh compared to older Welsh speakers. Almost two-thirds of those in the youngest age group stated that their Welsh language writing ability was good or very good, compared to fewer than half of those aged between 45 and 64.

The reasons for this are not entirely clear; one possible explanation is the increase in Welsh medium education and formal learning provision over the years. The lack of opportunity to use Welsh language writing ability in the past, for example when using services, may have affected the writing ability of older fluent Welsh speakers although there is no supporting evidence.

The figure below shows the difference in Welsh speakers' Welsh language writing ability by fluency and age.

Figure 10: Welsh speakers' description of their ability to write in Welsh by their fluency and age



Just over three quarters, or 77 per cent, of adults who had learnt Welsh at home as children could write well or very well in Welsh. A similar percentage of adults, 81 per cent, who had learnt Welsh at nursery school also stated that their writing ability was good or very good. Those adults who had learnt Welsh later in life, for example at primary or secondary school, university or through courses for adults, were far less likely to state that they could write well or very well in Welsh.

Gwynedd had the highest percentage of Welsh speakers who stated that their writing ability was either good or very good, with almost four in five people stating this. The percentage was lowest in Monmouthshire, where just over one in five stated that their writing ability was either good or very good.

7. How often do Welsh speakers speak the language?

7.1. Main Findings

The percentage of people in Wales who speak Welsh daily has not changed since the Welsh Language Use Surveys of 2004-06, and there is a clear link between fluency and frequency of Welsh language use.

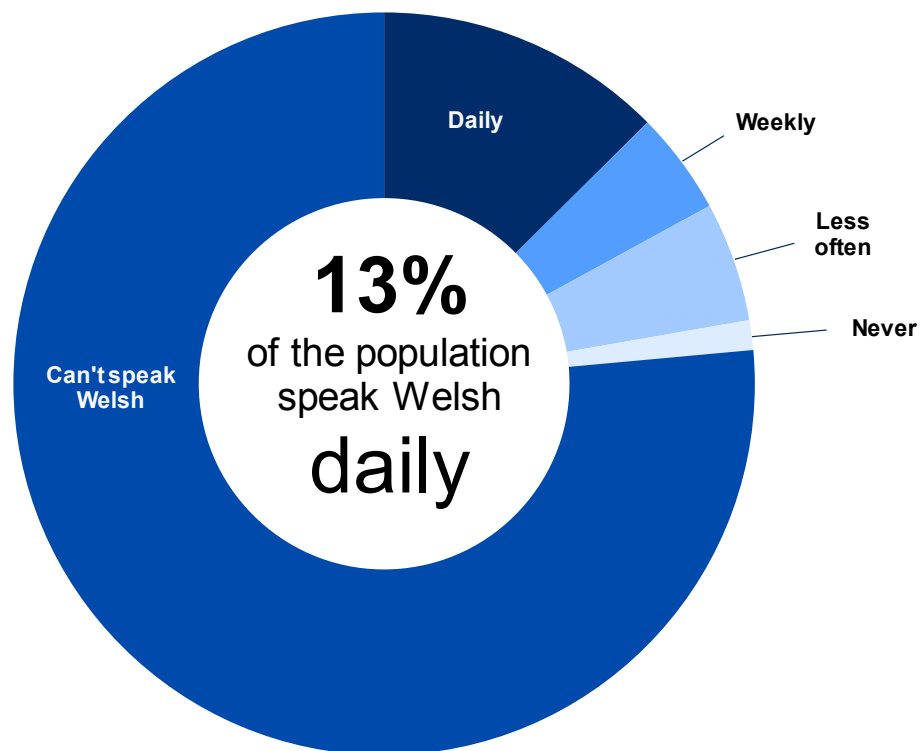
- 13 per cent of people aged three and over speak Welsh daily. 13 per cent also spoke Welsh daily according to the Welsh Language Surveys of 2004-06.
- Just over half of Welsh speakers speak Welsh daily; almost one in five speak Welsh every week.
- Fluent Welsh speakers speak Welsh more often than non-fluent Welsh speakers. 84 per cent of fluent Welsh speakers speak Welsh daily.
- The highest concentration of Welsh speakers who speak Welsh daily was found in local authority areas in west Wales, with the concentration at its highest in Gwynedd, the Isle of Anglesey, Ceredigion and Carmarthenshire. These areas contain the highest concentrations of Welsh speakers and are therefore likely to provide more opportunities for Welsh speakers to use the language often.
- The largest decrease in the number of people speaking Welsh daily since 2004-06 was found in these areas with the highest concentration of Welsh speakers. This reflects the decrease in the number of Welsh speakers in those areas noted in the 2011 Census.
- There was a substantial increase in the number of people speaking Welsh daily in south-east Wales, especially in Cardiff.

7.2. Frequency of speaking Welsh

Adults and young people were asked how often they spoke Welsh. Along with the information about people's ability to speak Welsh, information about how often they speak it contributes towards the picture of the vitality of the Welsh language.

In order to provide the contextual information for the remainder of the report, the figure below presents the results of the question on frequency of Welsh language use as a percentage of the whole population.

Figure 11: How often people speak Welsh

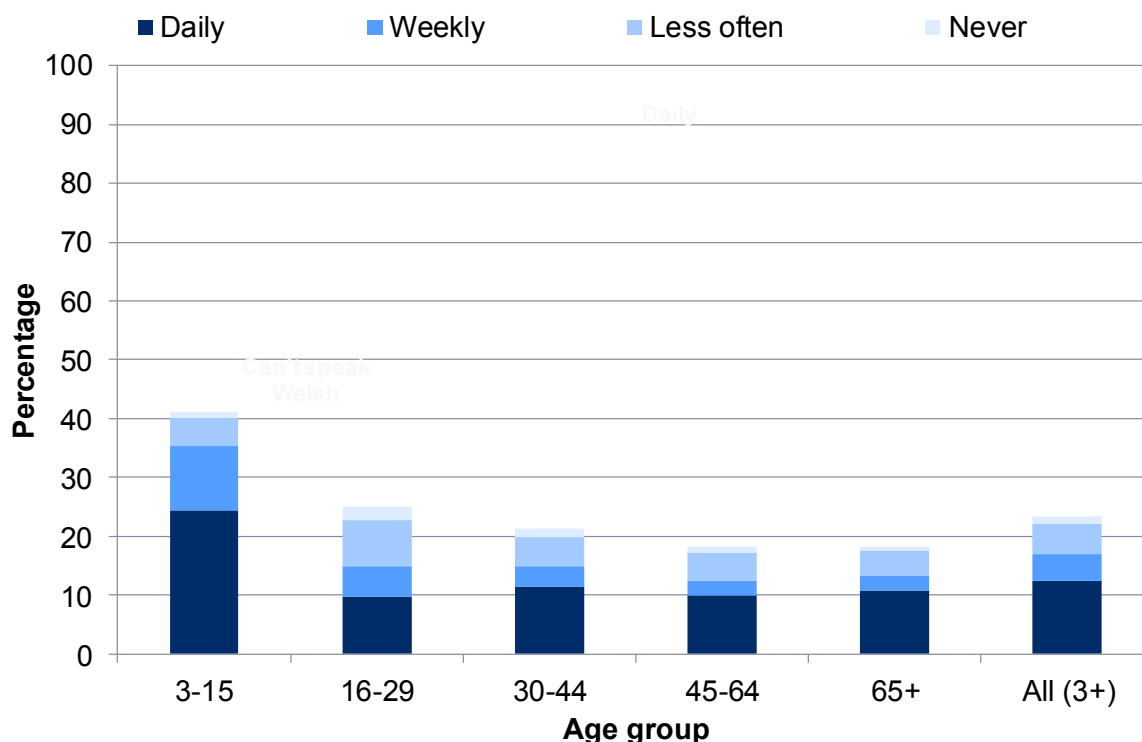


13 per cent of all people aged three and over living in Wales spoke Welsh daily. This represents around 360,900 people. This is exactly the same percentage as in 2004-06, when around 342,300 people spoke Welsh daily. Despite the percentage remaining constant since 2004-06, an increase of 18,600 was seen in the number of people who speak Welsh daily.

The percentage of people who spoke Welsh daily was slightly higher than the percentage of people who were fluent. This means that some Welsh speakers spoke Welsh daily even though they were not fluent. Slightly fewer than three quarters of those who spoke Welsh daily were fluent.

The figure below shows how the frequency of speaking Welsh amongst the population varied according to age.

Figure 12: Percentage of people who speak Welsh by age and frequency

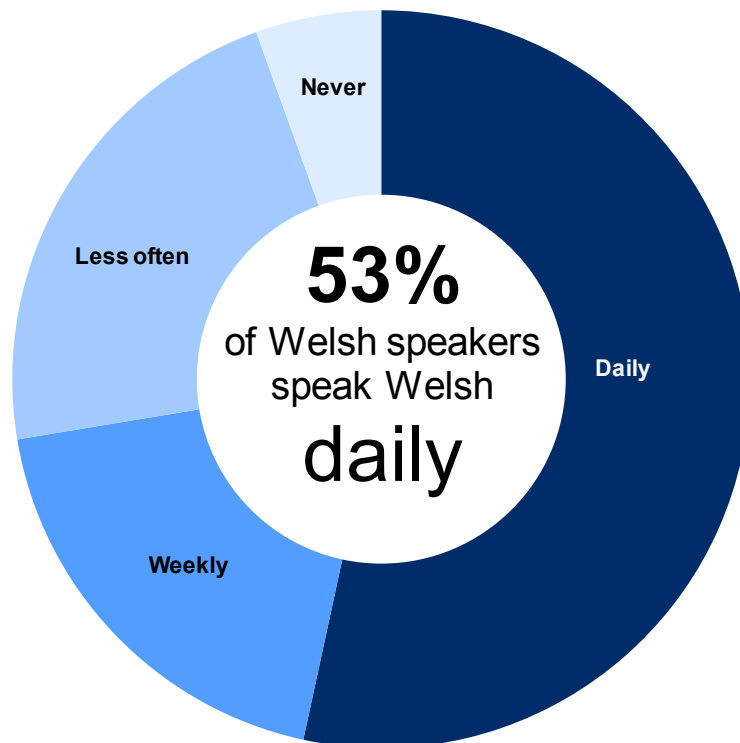


The percentage of people who spoke Welsh daily was relatively similar across the age groups, with the exception of the 3 to 15 age group. The percentage of 3 to 15 year olds who spoke Welsh daily was considerably higher than any other age group, with almost a quarter of them speaking Welsh daily. The percentage of children and young people aged 3 to 15 who spoke Welsh daily is similar to the percentage of pupils who receive their education in Welsh-medium or bilingual primary, middle and secondary schools, although we do not know if they are necessarily the same children (around 22 per cent of pupils according to the Pupil Level Annual School Census 2015a).

The remainder of this section on frequency of speaking Welsh, and the remainder of the report, analyses the characteristics of those people who said that they could speak Welsh.

The figure below shows how often Welsh speakers speak Welsh.

Figure 13: How often Welsh speakers speak Welsh

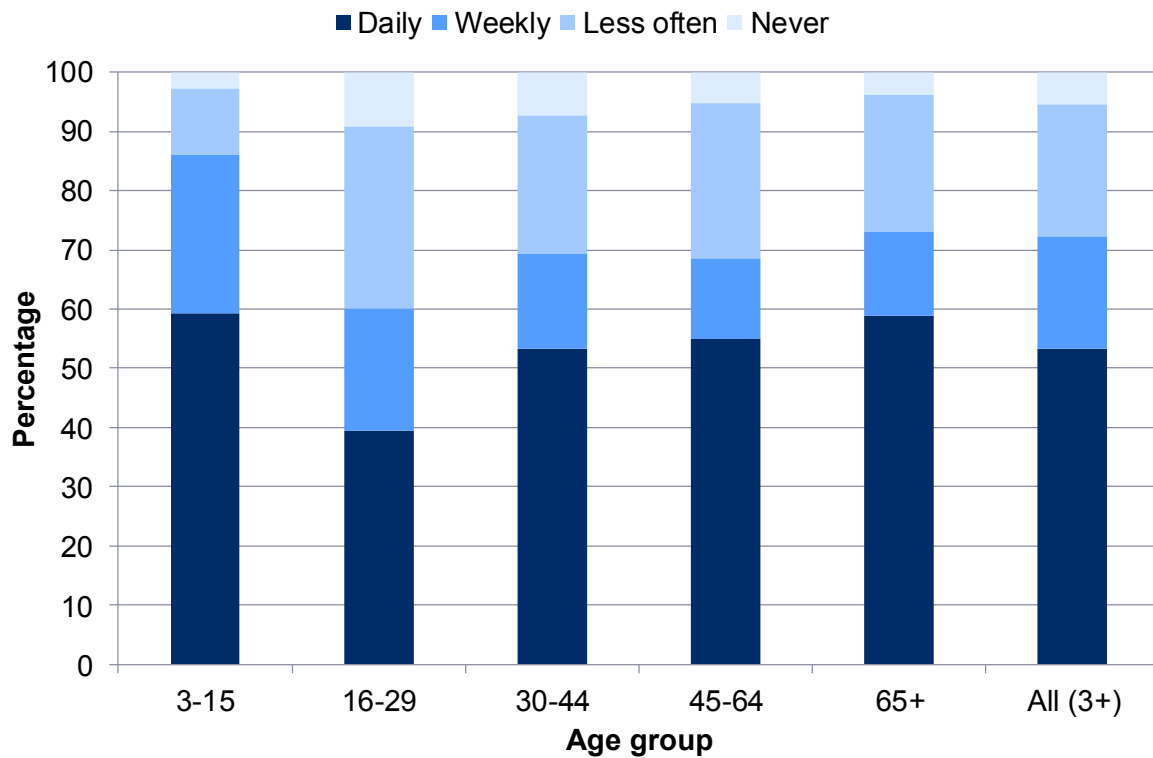


Over half of Welsh speakers spoke the language daily, and almost one in five spoke Welsh weekly. Slightly more than one in twenty Welsh speakers never spoke Welsh.

A question about how often respondents spoke Welsh was asked as part of the Annual Population Survey in the year up to 31 March 2015. 57 per cent stated that they spoke Welsh daily, 16 per cent spoke Welsh weekly, 22 per cent spoke Welsh less often than weekly and 5 per cent never spoke Welsh. The findings of the two surveys are very similar, which suggests that the Annual Population Survey is a useful measure for analysing short-term trends.

The figure below shows that frequency of speaking Welsh varies according to age.

Figure 14: Percentage of Welsh speakers by frequency of speaking Welsh and age



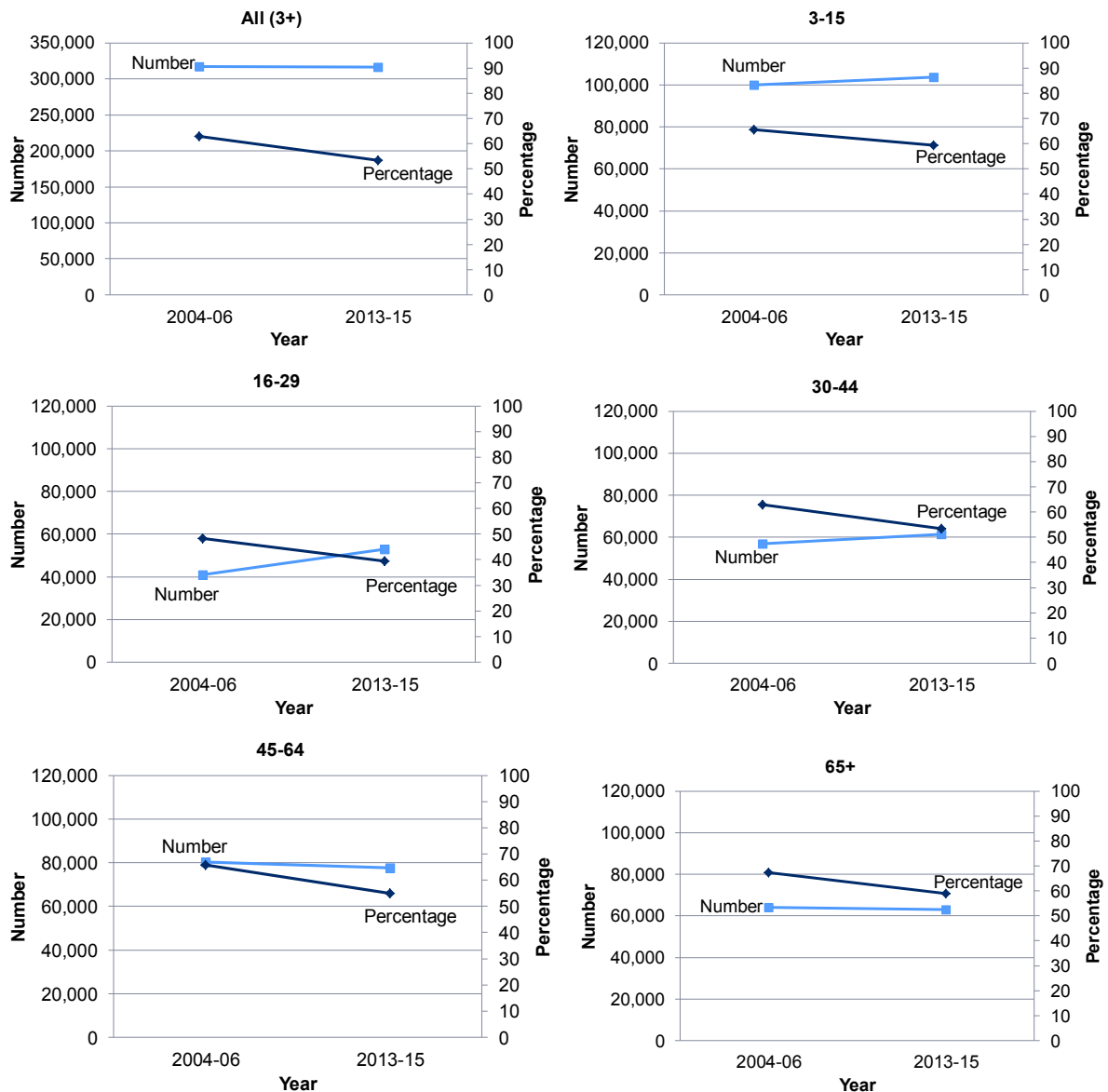
The percentage of Welsh speakers who spoke Welsh daily was relatively similar across the age groups. It varied between 53 and 59 per cent, with the exception of the 16 to 29 age group where 39 per cent spoke Welsh daily. It is not clear why frequency of use of Welsh is different amongst the 16 to 29 age group compared to other age groups. One possible reason is that individuals experience great change in their lives between these ages, with young people often moving away from home and setting out on their chosen career pathways. As a consequence, they move in different, and possibly more mixed, social circles such as at university or in the workplace.

59 per cent of Welsh speakers aged between 3 and 15 spoke Welsh daily even though only 36 per cent of them were fluent speakers. This probably reflects the fact that they use Welsh regularly at school.

The percentages of Welsh speakers who spoke Welsh daily amongst the other age groups were much closer to the percentages who could speak Welsh fluently (within eight percentage points).

The figure below shows how the numbers and percentages of Welsh speakers who spoke Welsh daily have changed since 2004-06 by age.

Figure 15: Number and percentage of Welsh speakers who speak Welsh daily by age and survey



Whilst the percentage of Welsh speakers who speak Welsh daily has decreased since 2004-06, the number has increased by around 18,600. This trend is not apparent in all age groups.

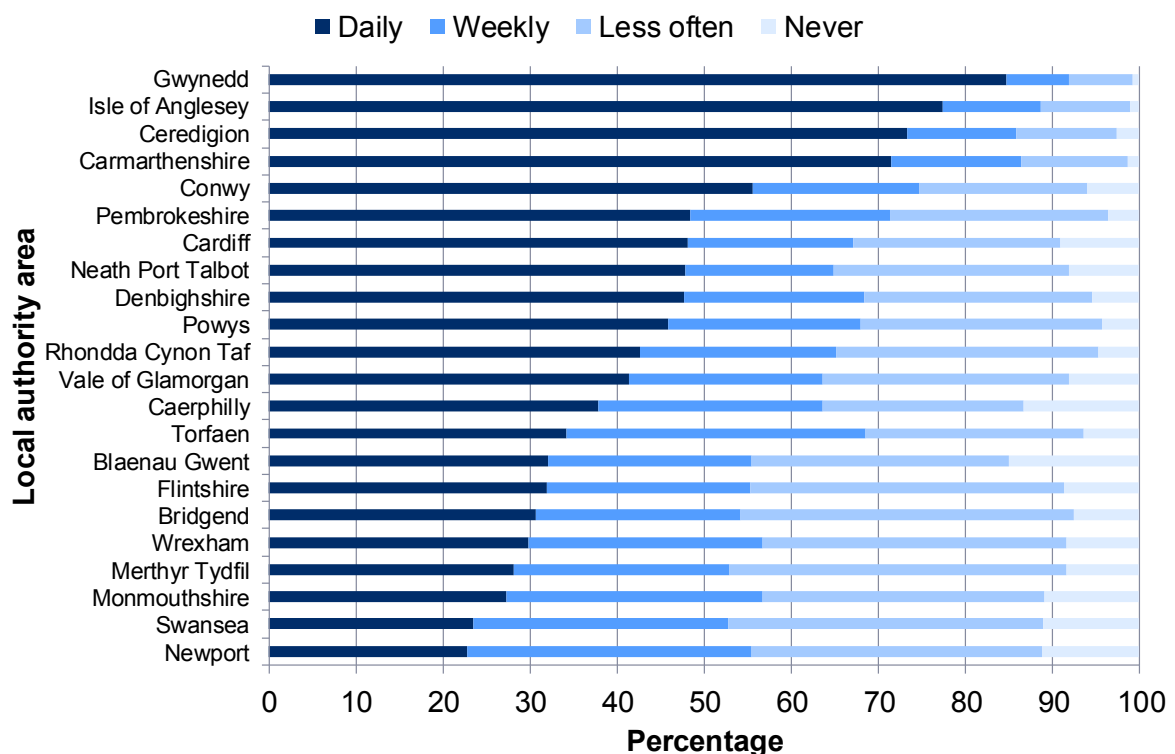
The percentage of Welsh speakers who speak Welsh daily decreased by between 6 and 11 percentage points in all age groups. However, the number of Welsh speakers who speak

Welsh daily had increased across the age groups up to 44 years old, and had decreased amongst the 45 and over age groups. This is related to the fact that fewer Welsh speakers in the older age groups are now fluent.

Fluent Welsh speakers are over three times as likely to speak Welsh daily as Welsh speakers who are not fluent, with 84 per cent of fluent Welsh speakers speaking Welsh daily compared to 26 per cent of Welsh speakers who are not fluent. This is fairly similar to 2004-06, when 87 per cent of fluent Welsh speakers spoke Welsh daily and 29 per cent of Welsh speakers who were not fluent spoke Welsh daily. Over 80 per cent of fluent Welsh speakers in all age groups spoke Welsh daily, except for the 16 to 29 age group, 68 per cent of whom spoke Welsh daily.

The figure below shows the frequency of speaking Welsh within local authority areas in descending order.

Figure 16: Percentage of Welsh speakers by frequency of speaking Welsh and local authority area



Most Welsh speakers living in areas with the highest percentages of Welsh speakers, i.e. west Wales, spoke Welsh daily. It is possible that the density of Welsh speakers in those

areas offers opportunities to use Welsh often. For example, 85 per cent of Welsh speakers in Gwynedd spoke Welsh daily. Other data from the Survey shows that more people in those areas used Welsh with their friends, their family, in the workplace and when trying to access services.

The percentages of Welsh speakers who spoke Welsh daily were lower in east Wales, especially in south-east Wales.

The table below shows how the numbers and percentages of Welsh speakers who spoke Welsh daily have changed since the Welsh Language Use Surveys of 2004-06.

Table 3: Numbers and percentages of people who speak Welsh daily by local authority area and survey

| | Welsh speakers who speak Welsh daily | | | | | |
|-------------------|--------------------------------------|------------|----------------|------------|---------------|------------------|
| | 2004-06 | | 2013-15 | | Difference | |
| | Number | Percentage | Number | Percentage | Number | Percentage point |
| Isle of Anglesey | 31,500 | 87 | 29,500 | 77 | -2,000 | -9 |
| Gwynedd | 75,300 | 90 | 73,200 | 85 | -2,100 | -6 |
| Conwy | 22,000 | 66 | 19,800 | 56 | -2,200 | -11 |
| Denbighshire | 14,800 | 57 | 13,600 | 48 | -1,100 | -10 |
| Flintshire | 6,900 | 35 | 8,700 | 32 | 1,800 | -3 |
| Wrexham | 6,800 | 39 | 8,200 | 30 | 1,300 | -9 |
| Powys | 11,000 | 43 | 13,700 | 46 | 2,700 | 2 |
| Ceredigion | 30,500 | 81 | 28,800 | 73 | -1,800 | -8 |
| Pembrokeshire | 11,900 | 52 | 11,000 | 48 | -900 | -4 |
| Carmarthenshire | 60,100 | 80 | 57,800 | 71 | -2,300 | -8 |
| Swansea | 11,500 | 49 | 9,500 | 23 | -2,000 | -26 |
| Neath Port Talbot | 12,300 | 62 | 10,700 | 48 | -1,600 | -14 |
| Bridgend | 4,200 | 37 | 5,400 | 31 | 1,200 | -7 |
| Vale of Glamorgan | 5,000 | 50 | 5,800 | 41 | 800 | -9 |
| Cardiff | 14,300 | 44 | 26,900 | 48 | 12,600 | 4 |
| Rhondda Cynon Taf | 8,400 | 35 | 16,100 | 43 | 7,700 | 7 |
| Merthyr Tydfil | 2,000 | 51 | 1,800 | 28 | -200 | -22 |
| Caerphilly | 5,300 | 46 | 8,200 | 38 | 2,900 | -8 |
| Blaenau Gwent | 1,800 | 29 | 2,100 | 32 | 300 | 3 |
| Torfaen | 2,500 | 34 | 3,500 | 34 | 1,100 | 0 |
| Monmouthshire | 2,100 | 25 | 3,300 | 27 | 1,200 | 3 |
| Newport | 2,100 | 22 | 3,300 | 23 | 1,200 | 1 |
| Wales | 342,300 | 63 | 360,900 | 53 | 18,600 | -9 |

The few local authority areas which saw an increase in the percentage of Welsh speakers who speak Welsh daily were located in south-east Wales. These areas also saw the largest increase in the number of Welsh speakers who speak Welsh daily.

There was a decrease of 26 percentage points in the percentage of Welsh speakers who speak Welsh daily in Swansea, and a 22 percentage point decrease in Merthyr Tydfil. These areas saw some of the largest percentage increases in the number of Welsh speakers who are not fluent. Non-fluent Welsh speakers were less likely than fluent Welsh speakers to speak Welsh daily, which explains the decrease seen. The largest decrease in the number of Welsh speakers who spoke Welsh daily was found in west Wales. There was a decrease of 1,800 or more in the number who spoke Welsh daily in the Isle of Anglesey, Gwynedd, Ceredigion and Carmarthenshire.

8. Which language do Welsh speakers feel most comfortable using?

8.1. Main findings

The majority of Welsh speakers feel most comfortable using English, but the majority of fluent Welsh speakers feel most comfortable using Welsh or equally comfortable using both languages.

- One in five Welsh speakers feel most comfortable using Welsh. This figure increases to just over two in five amongst fluent Welsh speakers.
- Just over a quarter of Welsh speakers feel equally comfortable using both languages.
- Older Welsh speakers are more likely than younger ones to feel more comfortable using Welsh.
- The vast majority of Welsh speakers who feel most comfortable using Welsh have learnt Welsh at home as a child.

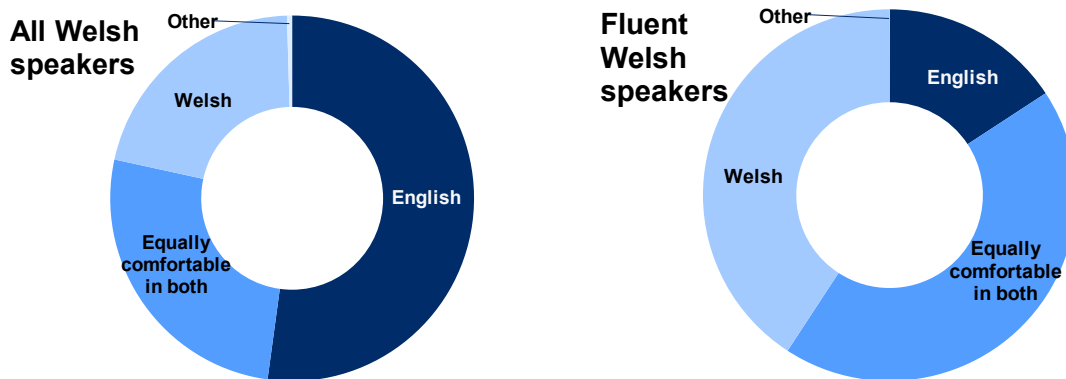
8.2. The language Welsh speakers felt most comfortable using

Adults were asked about the language which they feel most comfortable using. This was asked in an attempt to ascertain people's innate language preference. A range of factors probably influenced answers to this question, including fluency, confidence and personal feelings towards specific languages. Fluency in a language does not necessarily mean that a person will feel most comfortable using that language.

This question was not asked in the Welsh Language Use Surveys of 2004-06, and therefore results cannot be compared.

The figure below shows which language all Welsh speakers, and fluent Welsh speakers in particular, feel most comfortable using.

Figure 17: The language Welsh speakers feel most comfortable using



Just over one in five Welsh speakers felt most comfortable using Welsh, just over a quarter felt equally comfortable using both languages and over half of Welsh speakers felt most comfortable using English.

Just over two in five fluent Welsh speakers felt most comfortable using Welsh, two in five felt equally comfortable using both languages and the rest felt most comfortable using English (with a very small percentage feeling most comfortable using another language).

90 per cent of Welsh speakers who were not fluent felt most comfortable using English, and 8 per cent felt equally comfortable using both languages. The rest felt most comfortable using Welsh or another language.

The table below shows the percentage of Welsh speakers who felt most comfortable using Welsh, or equally comfortable using both languages, by age.

Table 4: Percentage of Welsh speakers who are most comfortable using Welsh, or equally comfortable using both languages, by age

| | Percentage of Welsh speakers who feel most comfortable using: | |
|------------------|---|-----------|
| | Equally comfortable | |
| | Welsh | in both |
| 16-29 | 14 | 26 |
| 30-44 | 18 | 25 |
| 45-64 | 24 | 23 |
| 65+ | 30 | 31 |
| All (16+) | 21 | 26 |

As with the trend regarding fluency, the percentage of people most comfortable using Welsh increased with age. Welsh speakers aged 65 and over were twice as likely to feel most comfortable using Welsh as Welsh speakers aged between 16 and 29.

The percentage of people who felt equally comfortable using both languages was relatively similar across the age groups, apart from those aged 65 and over. The percentage decreased slightly with age but was at its highest amongst people aged 65 and over.

The table below compares the percentages of fluent Welsh speakers with the percentages of Welsh speakers who were most comfortable using Welsh, or equally comfortable using Welsh and English, by age.

Table 5: Percentages of fluent Welsh speakers and percentages of Welsh speakers who are most comfortable using Welsh, or equally comfortable using Welsh and English, by age

| | Percentage of Welsh speakers that are: | |
|------------------|--|--|
| | fluent | most comfortable using Welsh, or equally comfortable in both |
| 16-29 | 47 | 40 |
| 30-44 | 49 | 43 |
| 45-64 | 49 | 47 |
| 65+ | 60 | 61 |
| All (16+) | 47 | 47 |

The percentage of fluent Welsh speakers was fairly similar to the percentage of people who were most comfortable using Welsh, or equally comfortable using Welsh and English. The largest differences were seen in the younger age groups, with a higher percentage of people stating that they were fluent compared to the percentage that were most comfortable using Welsh, or equally comfortable using Welsh and English.

Almost all of those who felt most comfortable using Welsh spoke Welsh daily. Almost three quarters of those who felt equally comfortable using both languages spoke Welsh daily. Just over one in five of those who felt most comfortable using English spoke Welsh daily.

83 per cent of Welsh speakers who felt most comfortable using Welsh, or equally comfortable using Welsh and English, had learnt to speak Welsh at home as a young child.

9. Where did Welsh speakers learn to speak the language?

9.1. Main findings

Young Welsh speakers are more likely to have learnt to speak Welsh at school than anywhere else. Older Welsh speakers are more likely to have learnt Welsh at home as a young child than anywhere else.

- 43 per cent of Welsh speakers have learnt Welsh at home as a young child, 11 per cent at nursery, 25 per cent at primary school and 15 per cent at secondary school.
- The percentage of people who have learnt to speak Welsh at home as a young child varies from 21 per cent of young people aged 3 to 15 to 79 per cent of people aged 65 and over.
- The percentage of Welsh speakers who have learnt the language at school also therefore varies considerably according to age, from 79 per cent of children and young people aged 3 to 15 to 13 per cent of people aged 65 and over. The likely reason for this is the substantial change in the Welsh-medium education sector over the past fifty years, with an increase in the number of pupils learning through the medium of Welsh and in the number of Welsh-medium schools which have opened across Wales.
- Welsh speakers who have learnt Welsh at home as a young child are more likely to be fluent than those who have learnt to speak the language at school.

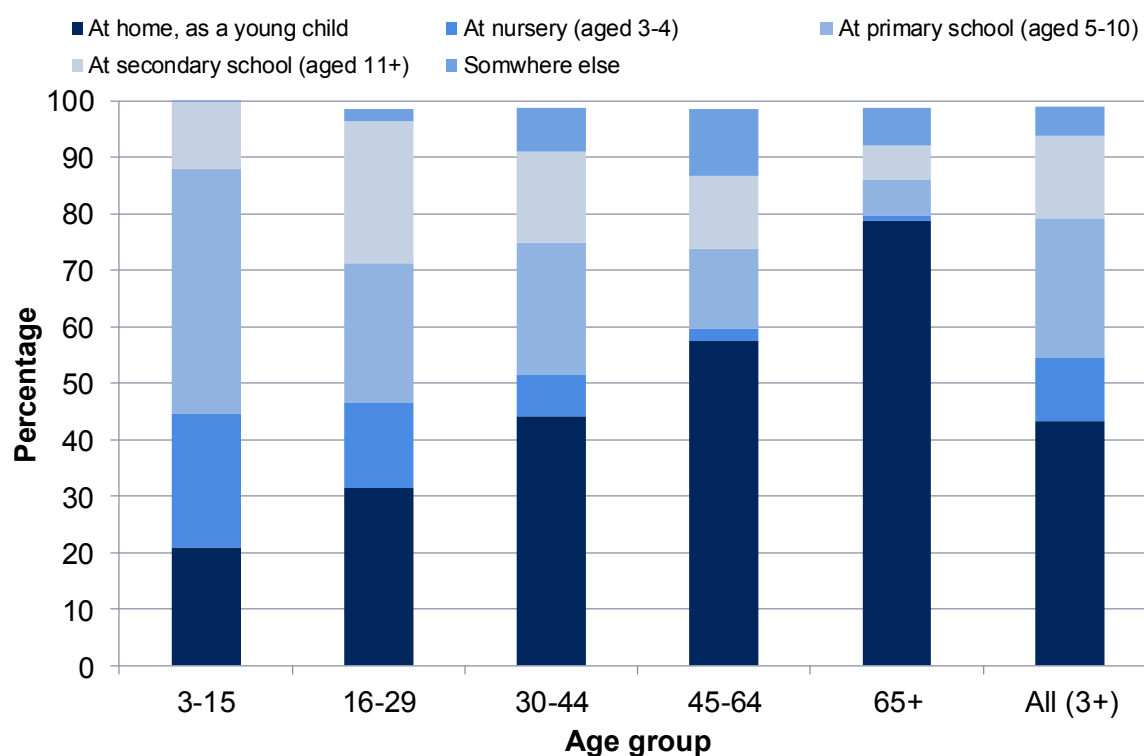
9.2. Where Welsh speakers learnt the language

Adults and young people were asked about where they had learnt to speak Welsh.

One of the Welsh Government's strategic objectives is to encourage and support the use of the Welsh language within families. One of the Government's objectives in seeking to achieve this is to encourage Welsh-speaking parents and carers to pass on the language to their children. The Government's Welsh-medium Education Strategy sets out the strategic direction for planning and delivering Welsh-medium education provision in all phases of education and training.

The figure below shows where Welsh speakers mainly learnt to speak Welsh by age.

Figure 18: Where Welsh speakers mainly learnt the language by age



The above figure shows data for Welsh speakers who learnt to speak Welsh at home as young children, learnt it at school or somewhere else (including on a Welsh for Adults course). A small percentage of Welsh speakers learnt to speak Welsh at college or university. They have been included with people who learnt Welsh ‘Somewhere else’ in the above figure.

It is important to note that the data does not show how many people have continued to learn Welsh from nursery through to primary and secondary school. The question asked respondents about where they had mainly learnt to speak Welsh.

Just over half of Welsh speakers had learnt to speak Welsh at school. 43 per cent of Welsh speakers had learnt to speak Welsh at home as young children, 11 per cent had learnt it at nursery, 25 per cent at primary school and 15 per cent at secondary school.

However, there was a considerable difference in terms of where Welsh speakers had learnt the language according to age, with those aged 3 to 15 far less likely than those aged 65 and over to have learnt to speak Welsh at home as young children. Just over one in five

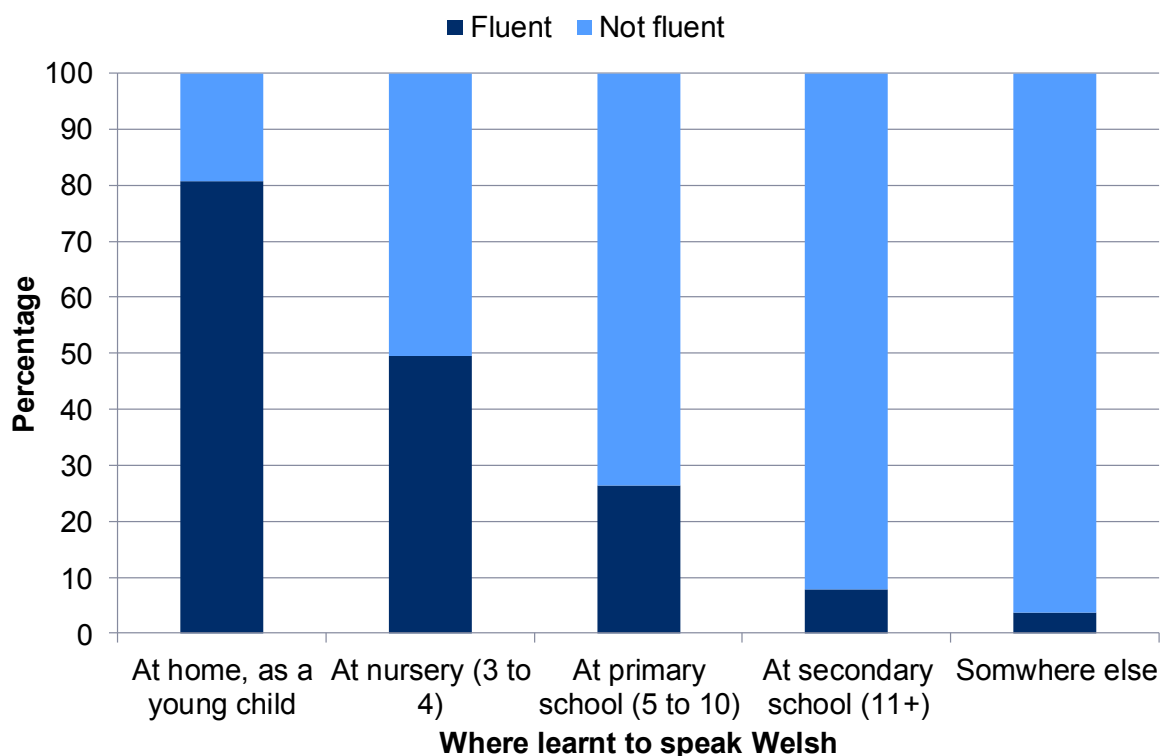
Welsh speakers aged 3 to 15 had learnt to speak Welsh at home as young children, compared to almost four in five Welsh speakers aged 65 and over.

The likely reason for this is the substantial change in the Welsh-medium education sector over the past fifty years, with an increase in the number of pupils learning through the medium of Welsh and in the number of Welsh language schools which have opened across Wales.

The percentage of Welsh speakers who have learnt to speak Welsh at home as young children has decreased since 2004-06 – at that time 53 per cent of Welsh speakers stated that they had learnt to speak Welsh at home as a young child.

The figure below shows the percentage of fluent and non-fluent Welsh speakers according to where they learnt to speak Welsh.

Figure 19: Fluency of Welsh speakers by where they learnt to speak Welsh



Further analysis of the medium of instruction of children and young people in different subjects is available in section 11.4.

Welsh speakers who learnt to speak Welsh at home as young children are more likely to be fluent than those who learnt to speak Welsh at school. More than four in five Welsh speakers who learnt to speak Welsh at home as young children were fluent.

10. Language of the home as a child

10.1. Main findings

Just under half of all Welsh speakers have at least one parent who is, or was, fluent.

- Welsh speakers with at least one parent who was fluent are more than twice as likely to speak Welsh daily as Welsh speakers with no parents who were fluent.
- 40 per cent of those without parents who were fluent have learnt Welsh primarily at primary school, whilst 25 per cent have learnt it at secondary school.

10.2. Parents' Welsh language ability

Language transmission from one generation to the next is a key part of language planning (Welsh Government 2012a). It enables and encourages children and young people to acquire the language. It has already been noted in section 9.2 that 43 per cent of Welsh speakers had learnt to speak Welsh at home as young children.

The 2011 Census provides information on Welsh language ability amongst 3 to 4 year old children by their parents' Welsh language skills. For the purposes of the Census, this is referred to as language transmission. Using Census data, Welsh language transmission is referred to as the rate of 3 to 4 year old children within different types of families who are able to speak Welsh. Data from the Census shows that there is a strong link between ability to speak Welsh at an early age (i.e. at 3 and 4 years old) and the ability of parents to speak Welsh.

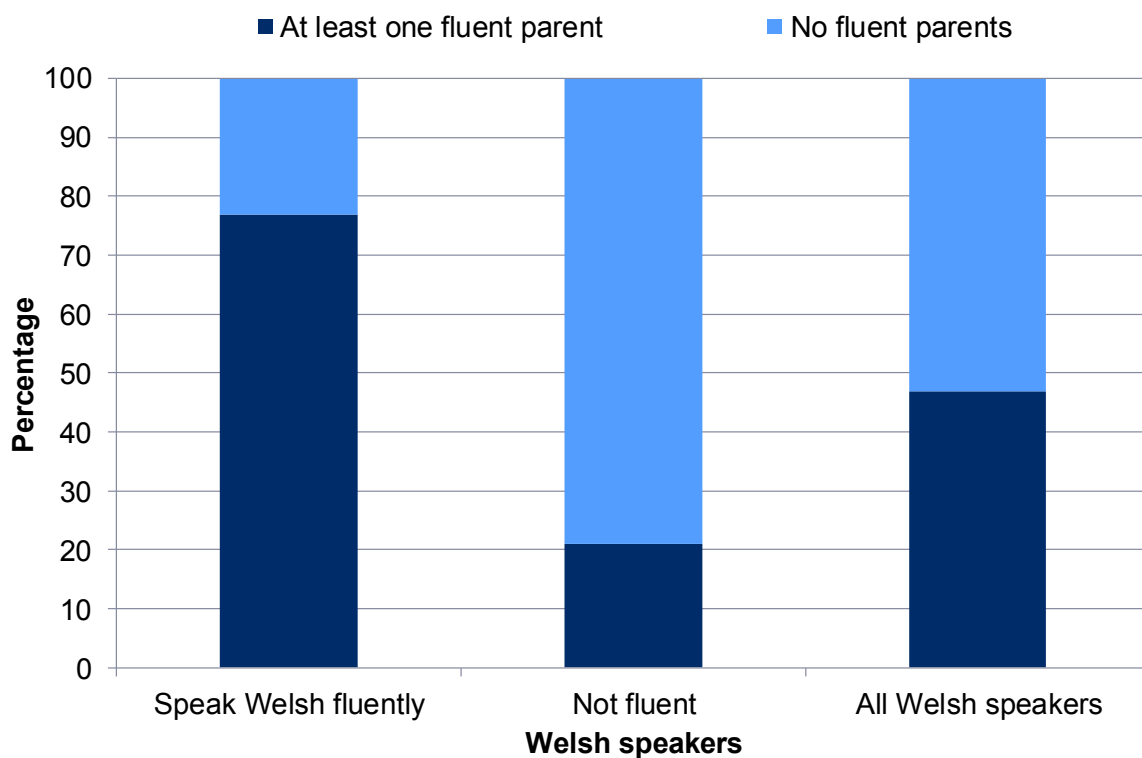
Adults were asked a question about the Welsh language skills of their parents when they were children, and children and young people were asked a similar question about the current Welsh-speaking ability of their parents. In addition to this, children and young people were asked a further question about the Welsh language ability of any siblings. These questions provide information on the wider levels of fluency of the household and its relationship with the fluency levels of the child.

47 per cent of all Welsh speakers, whatever their fluency levels, had at least one parent who is or was fluent in Welsh. Almost a quarter stated that neither of their parents could speak Welsh at all.

77 per cent of fluent Welsh speakers had at least one parent who was fluent in Welsh, whilst 8 per cent of fluent Welsh speakers came from homes where neither parent spoke Welsh at all.

One in five Welsh speakers who were not fluent stated that at least one parent in the household could speak Welsh fluently. A substantial percentage, 37 per cent, of those with some Welsh came from homes without any fluent Welsh-speaking parents.

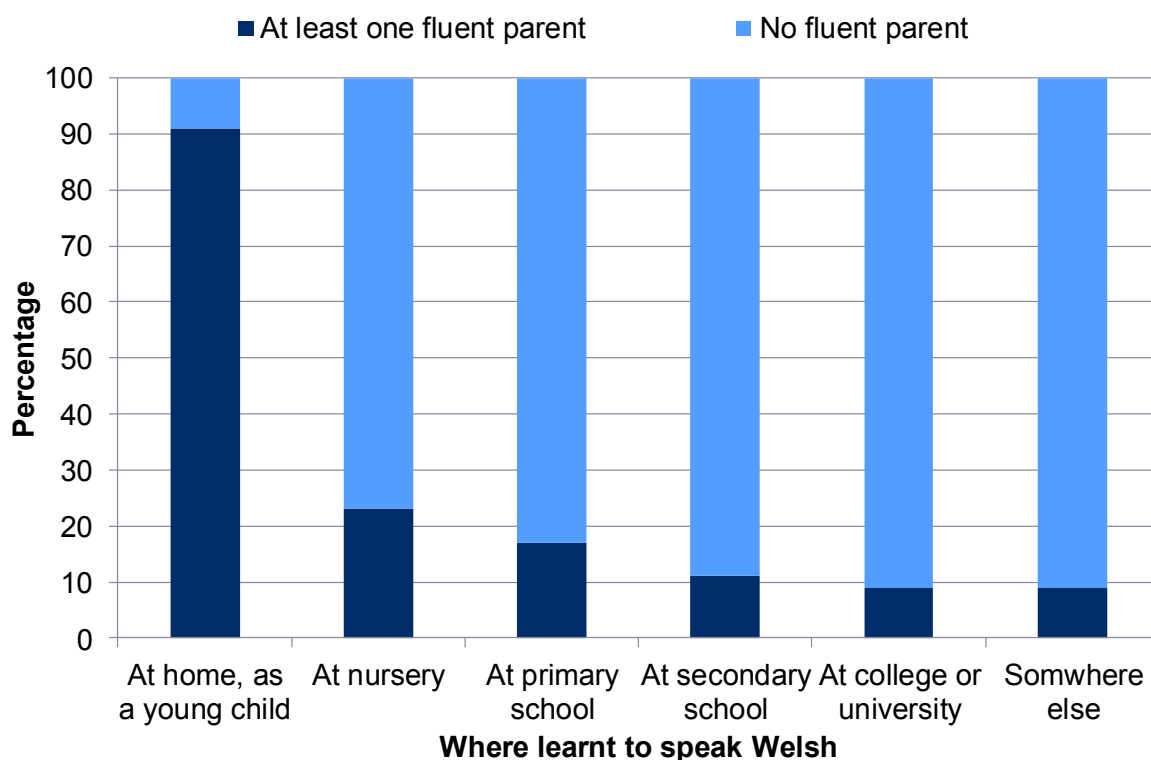
Figure 20: Percentage of fluent and non-fluent Welsh speakers with at least one parent able to speak Welsh fluently



Looking at Census data for households where both parents could speak Welsh, the transmission rate remained constant at around 82 per cent between the 2001 and 2011 Censuses. This means that in households with children aged 3 to 4 years where both parents could speak Welsh, 82 per cent of the children could also speak Welsh. Between 2001 and 2011, the transmission rate within households where one parent could speak Welsh rose from 40 per cent to 45 per cent.

In the Welsh Language Use Survey, the vast majority, 82 per cent, of Welsh speakers with at least one fluent Welsh-speaking parent had learnt to speak Welsh at home. Five per cent stated that they had learnt Welsh at nursery school, nine per cent at primary school and three per cent at secondary school. Of those with no fluent Welsh-speaking parents, the highest percentage, 40 per cent, had learnt to speak Welsh primarily at primary school, and 25 per cent had learnt at secondary school. This means that almost two thirds of people who come from homes with no fluent Welsh-speaking parents rely primarily on the education system to learn Welsh.

Figure 21: Where the Welsh language was learnt by whether they have a fluent Welsh-speaking parent

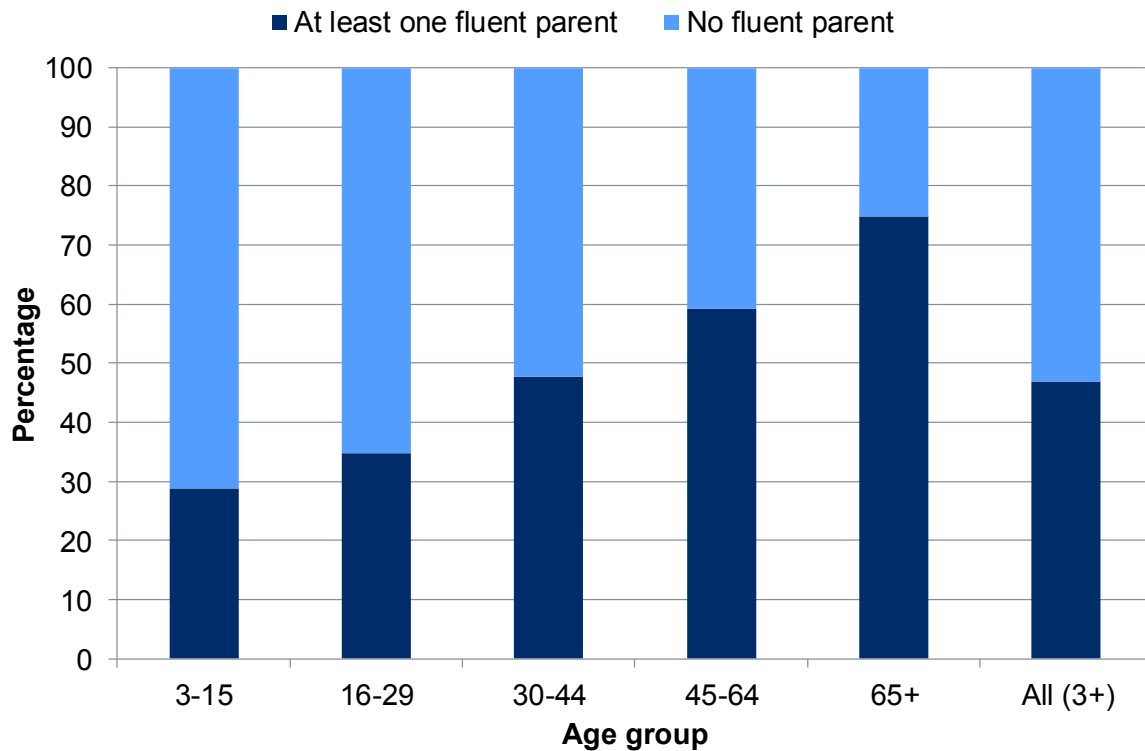


Welsh speakers were twice as likely to speak Welsh daily if they had at least one fluent Welsh-speaking parent, whereas one third of those individuals with no fluent Welsh-speaking parents spoke Welsh daily.

The percentage of Welsh speakers who had at least one fluent Welsh-speaking parent varied greatly by age. Fewer than a third, or 29 per cent, of Welsh speakers aged 3 to 15 said that they had at least one fluent Welsh-speaking parent, while the percentage was 75 per cent for Welsh speakers aged 65 and over. The pattern was very similar for those Welsh

speakers who had two fluent Welsh-speaking parents. 10 per cent of Welsh speakers aged 3 to 15 said that they came from a home where both parents were fluent Welsh speakers, compared to 57 per cent of Welsh speakers aged 65 and over.

Figure 22: Percentage with at least one fluent Welsh-speaking parent by age



With regards to using Welsh at home, 43 per cent of those who had at least one fluent Welsh-speaking parent said that they always or almost always spoke Welsh at home, 8 per cent said they mainly spoke Welsh and 16 per cent said that they made roughly an equal use of Welsh and English. A third, 34 per cent, stated that they spoke mainly English, or always or almost always English.

11. Language of education

11.1. Main findings

Young people are more likely than older people to have received their education only or mainly through the medium of Welsh.

- The proportion of adults who have attended a nursery, primary or secondary school where only or mainly Welsh was the language of education is higher for those under the age of 45 than for those aged 45 and over. However, it should be borne in mind that Welsh-medium education was not available to the same extent as it is today when people aged 45 and over were at school.
- The proportion of Welsh-speaking adults whose nursery, primary or secondary education was only or mainly through the medium of Welsh is much higher for those who are fluent, compared to those who are not fluent.

11.2. Language of education

As part of the survey, adults and young people were asked about the language of their education. The two age groups were asked different questions. The questions for adults focussed on the language of their education at each stage of the education system, whilst the questions for young people asked about the language used to teach particular subjects. Only secondary school children answered these questions in the young people's questionnaire.

The Welsh-medium education sector has changed substantially over the past fifty years and more, with an increase in the number of pupils learning through the medium of Welsh and in the number of Welsh-medium schools which have opened across Wales. The Welsh Government's Welsh-medium Education Strategy sets out its strategic direction for planning and delivering Welsh-medium education provision in all phases of education and training.

This change over the past fifty years has offered more opportunities for children and young people to choose Welsh-medium education compared to previous generations. The results of one of the previous sections show that children and young people are far more likely than older people to have learnt Welsh at school.

It is therefore important to remember this change when analysing the language of education by age. It is reasonable to expect that fewer older people will have received their education through the medium of Welsh compared to younger people. When analysing the language of education based on local authority areas it is also important to note that the availability of Welsh-medium education has varied over time in these areas, with Welsh-medium and bilingual schools opening in different places at different times.

Not all local authority areas currently offer Welsh-medium secondary education. There are no Welsh-medium secondary schools in Merthyr Tydfil, Blaenau Gwent, Monmouthshire or Newport.³ However, this does not necessarily mean that children and young people in these areas cannot access Welsh medium education. Children and young people from these areas may travel further to a neighbouring local authority area to be educated through the medium of Welsh.

11.3. Language of education - adults

Almost half of Welsh speakers received their nursery and primary education only or mainly through the medium of Welsh, compared to one third who received a Welsh-medium secondary education.

The output indicators of the annual reports on the Welsh Government's Welsh-medium Education Strategy show that fewer secondary school pupils currently are assessed in Welsh as first language compared to primary school pupils. In 2015, 22.2 per cent of 7 year old pupils were assessed in Welsh as first language compared to 17.8 per cent of 14 year old pupils.

The table below shows the percentages of Welsh speakers who received their nursery, primary or secondary education only or mainly through the medium of Welsh.

³ Schools' Welsh-medium provision is defined in accordance with Welsh Government guidelines *Defining schools according to Welsh medium provision*.

Table 6: Percentage of Welsh speakers who have received their nursery school, primary school or secondary school education only or mainly in Welsh

| | Only or mainly in Welsh |
|---------------------------|----------------------------|
| Nursery school language | 45 |
| Primary school language | 48 |
| Secondary school language | 33 |

Almost four in five fluent Welsh speakers had received their nursery education only or mainly through the medium of Welsh, whereas one in ten had received their nursery education only or mainly through the medium of English. 16 per cent of non-fluent Welsh speakers stated that their nursery education was through the medium of Welsh.

78 per cent of fluent Welsh speakers received their primary education only or mainly through the medium of Welsh, which is similar to the percentage who had received their nursery education only or mainly through the medium of Welsh. 9 per cent received their primary education only or mainly through the medium of English.

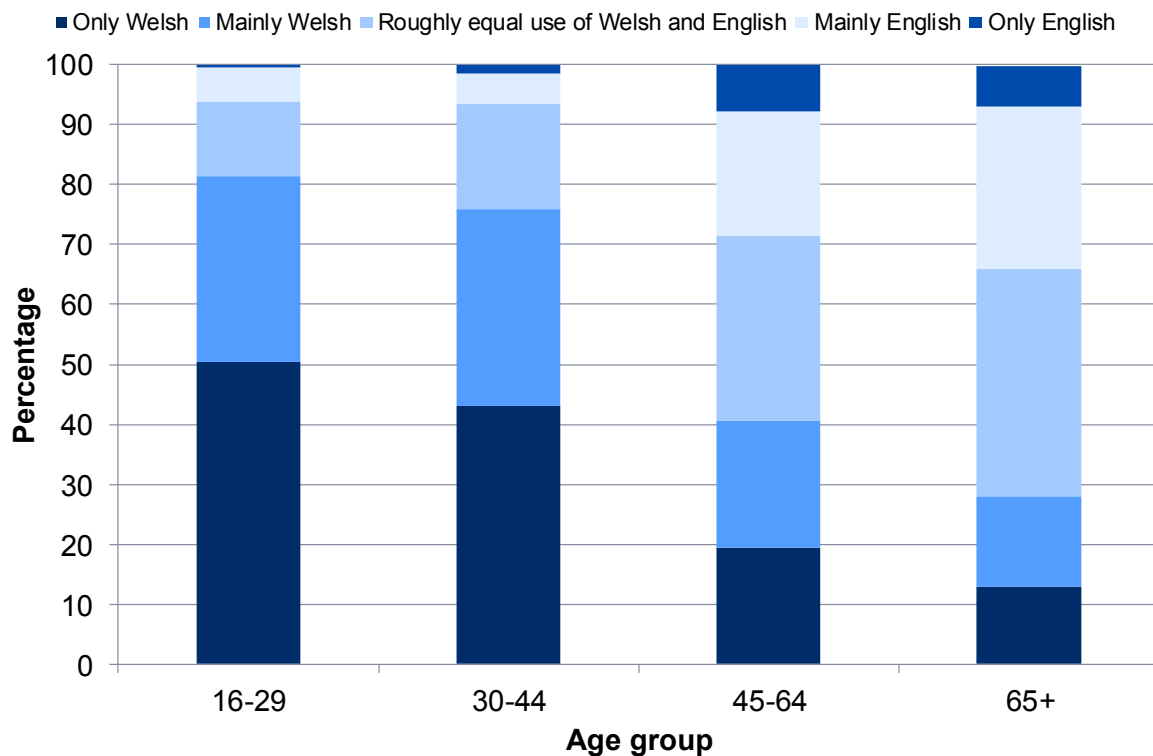
The biggest differences were observed when analysing fluent adults' language of secondary education. Just over half of fluent Welsh speakers had received their secondary education only or mainly through the medium of Welsh, and almost a quarter had received a secondary education which made roughly equal use of Welsh and English. Almost one in five fluent Welsh speakers had received their secondary education through the medium of English. 9 per cent of non-fluent Welsh speakers had received their secondary education only or mainly through the medium of Welsh and over three quarters had received their secondary education only or mainly through the medium of English.

86 per cent of all Welsh speakers who received their secondary education only or mainly through the medium of Welsh described themselves as fluent, which is slightly lower than in 2004-06 when 91 per cent of this group had described themselves as fluent speakers.

There is a clear link between age and the number of people who received their secondary education through the medium of Welsh. Welsh-medium education was being developed when the older age groups were in the education system. Fluent Welsh speakers aged between 16 and 29 were almost three times more likely to have received their secondary education through the medium of Welsh only than those aged 65 and over.

The figure below shows the language of secondary education of fluent Welsh speakers by age.

Figure 23: Language of secondary education of fluent Welsh speakers by age

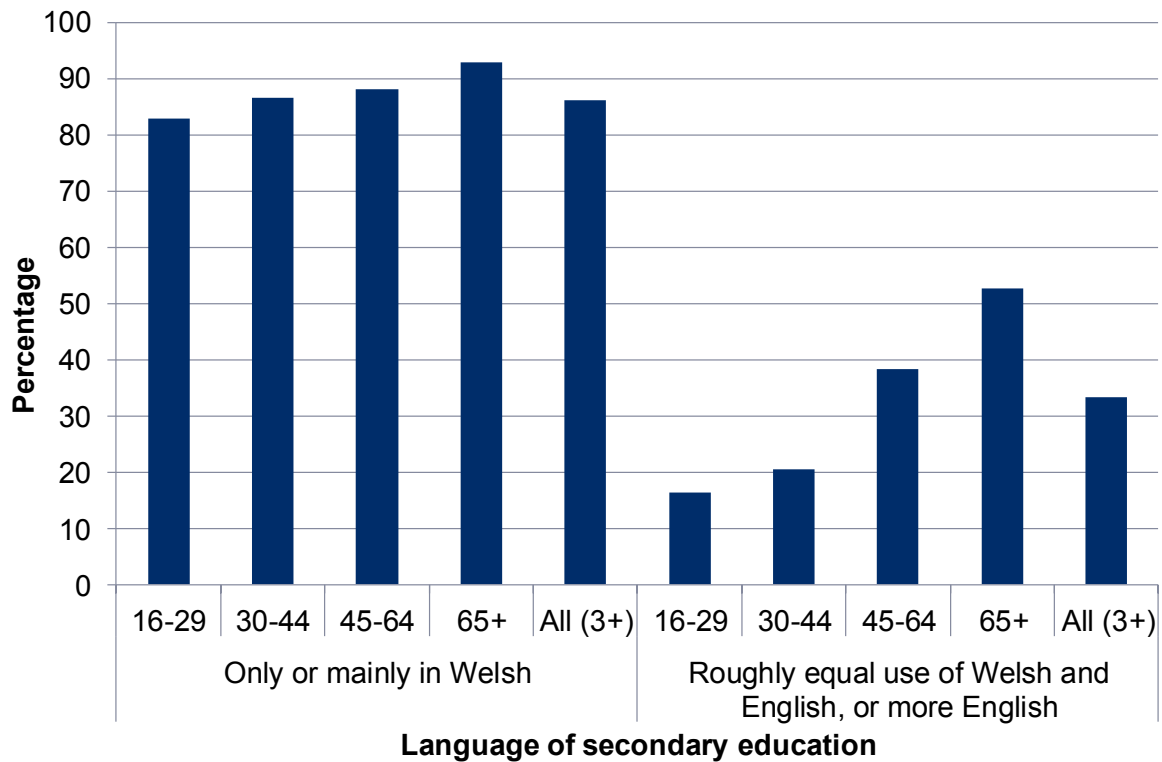


74 per cent of all Welsh speakers who had learnt to speak Welsh at home as children had received their nursery education only or mainly through the medium of Welsh and 68 per cent of the same group had received their primary education only or mainly through the medium of Welsh. Fewer than half of Welsh speakers who had learnt to speak Welsh at home as children had received their secondary education through the medium of Welsh. The Welsh Government’s Welsh-medium Education Strategy annual reports show that the percentage of pupils who are assessed in Welsh first language decreases between the primary and secondary school (Welsh Government 2015b).

Again, there is a clear correlation between age and learning Welsh at home as a child and Welsh-medium education. 73 per cent of people aged between 16 and 29 who had learnt to speak Welsh at home as children had received their secondary education through the medium of Welsh, compared to 24 per cent of people aged 65 and over.

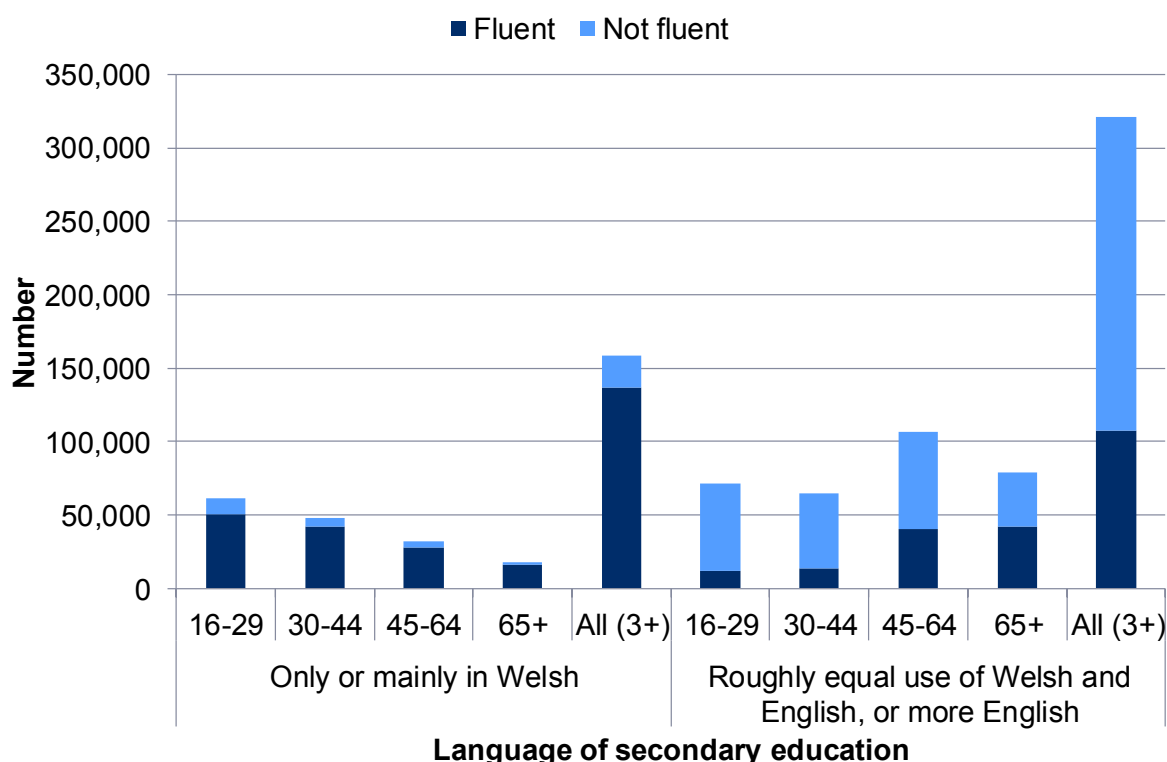
The figures below show the fluency of Welsh speakers according to the language of their secondary education and their age.

Figure 24: Percentage of fluent Welsh speakers by the language of their secondary education



The percentage of Welsh speakers who had received their secondary education only or mainly through the medium of Welsh and who were fluent increased with age. However, the number of Welsh speakers who had received their secondary education only or mainly through the medium of Welsh and who were fluent was much higher amongst the younger age groups than the older age groups.

Figure 25: Number of fluent and non-fluent Welsh speakers by the language of their secondary education



The percentage of Welsh speakers who received their education only or mainly through the medium of Welsh varied according to local authority area. It is important to note that a child may live in one local authority area but receive his/her education in a different local authority area. Also, adults may now live in a different local authority area to the one that they received their education. The data here is based on the home location of the survey respondent.

The percentage of all Welsh speakers who received their nursery education only or mainly through the medium of Welsh varied from 10 per cent in Monmouthshire to 70 per cent in Gwynedd. The percentages were very similar for Welsh-medium primary education, with 12 per cent of Welsh speakers receiving their primary education through the medium of Welsh in Monmouthshire and 71 per cent in Gwynedd.

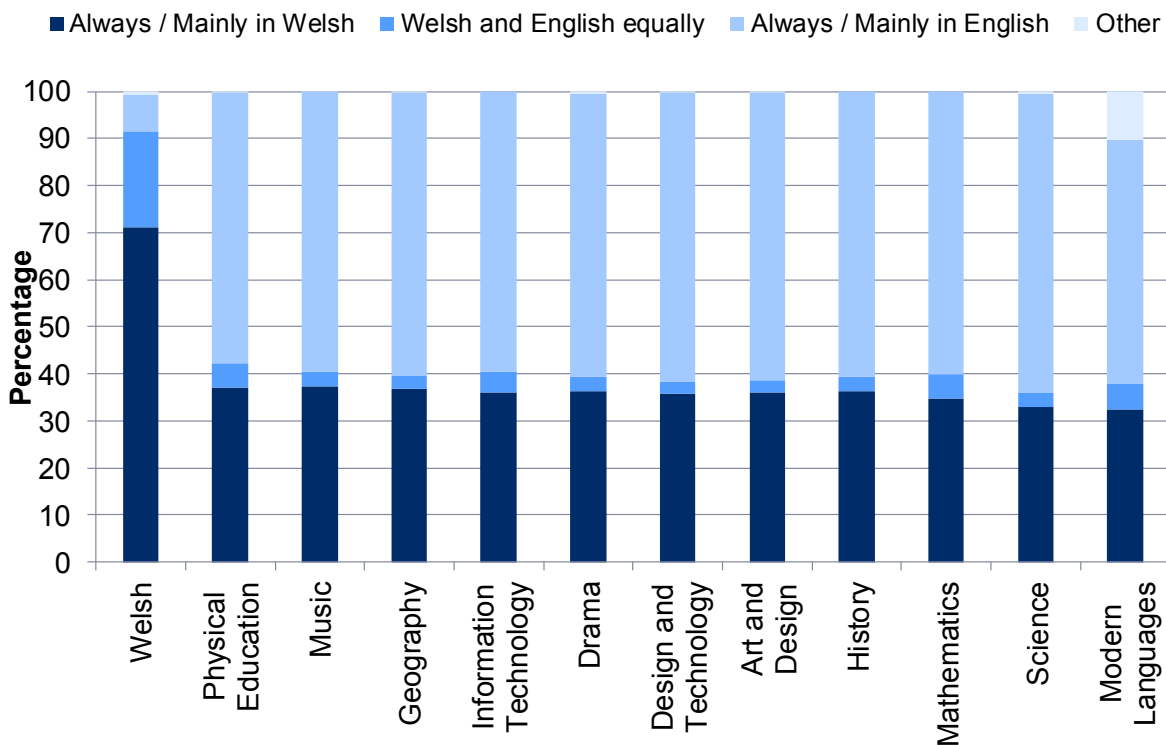
6 per cent of Welsh speakers in Monmouthshire stated that they had received secondary education only or mainly through the medium of Welsh, compared to 50 per cent in Gwynedd.

11.4. Language of education – young people

The latest Pupil Level Annual School Census data shows that 24 per cent of all learners in Wales are in Welsh-medium and bilingual primary schools and that 20 per cent of all learners in Wales are in Welsh-medium or bilingual secondary schools.

Young people aged between 11 and 15 who stated that they could speak Welsh were asked in which language they studied different subjects at secondary school. For the purpose of this analysis, those that stated that they were taught the subjects always or almost always in Welsh, or mainly in Welsh, have been grouped together and are referred to as those who are always or mainly taught in Welsh. Their responses are shown in the figure below.

Figure 26: Language in which Welsh speakers aged 11 to 15 study subjects at secondary school

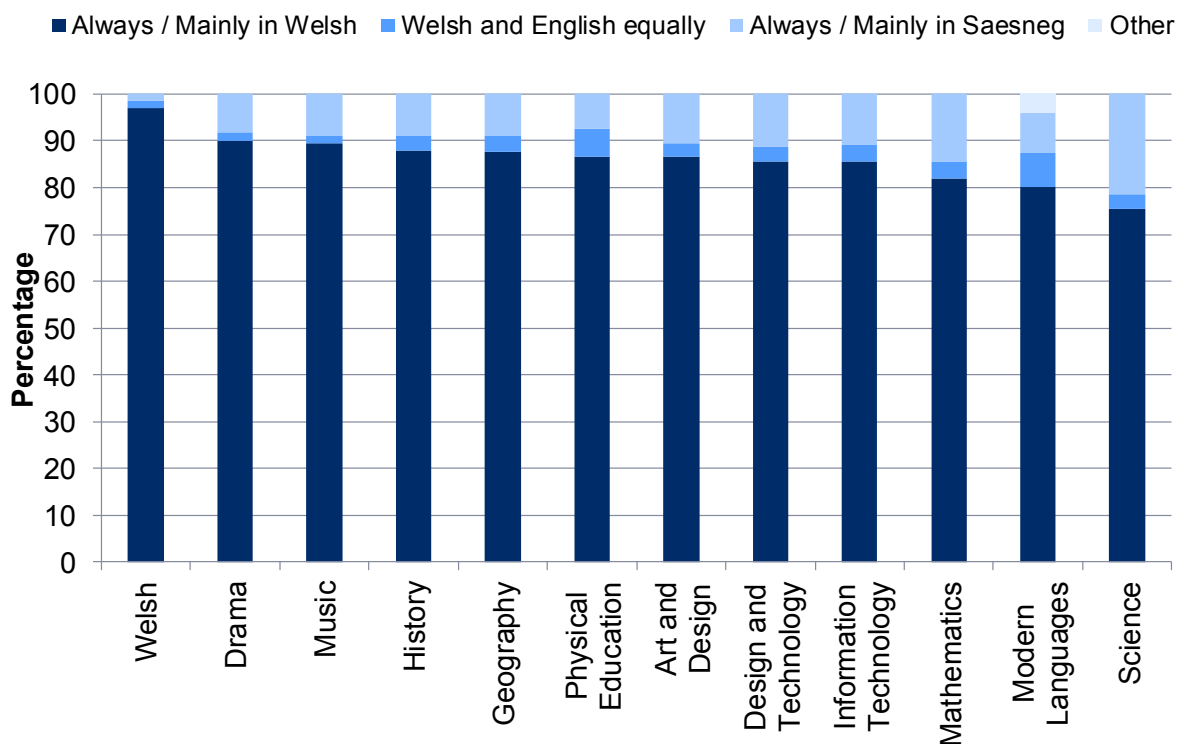


The figure shows that with the exception of Welsh as a subject, the proportion of Welsh speakers who were taught the other subjects through the medium of Welsh varied from 32 per cent for modern languages to 37 per cent for music. 71 per cent of people aged between 11 and 15 stated that the Welsh language was taught always or mainly in Welsh. The question asked did not differentiate between learning Welsh as a first language and as a

second language. Some Welsh speakers aged between 11 and 15 learn Welsh as a second language. It's possible that these young people have noted that some of the teaching is through the medium of English as they attend English-medium schools.

Young people who were fluent in Welsh were more likely to study secondary school subjects through the medium of Welsh than through the medium of English. The figure below shows in which language young people that spoke Welsh fluently learnt different subjects. The percentages of fluent young people aged between 11 and 15 who learnt different subjects always or mainly through the medium of Welsh varied according to subject. 76 per cent of young people who were fluent learnt science always or mainly through the medium of Welsh and 90 per cent learnt drama always or mainly through the medium of Welsh. 97 per cent of all young people who were fluent in Welsh received Welsh language lessons always or mainly through the medium of Welsh.

Figure 27: Language in which fluent Welsh speakers aged between 11 and 15 study subjects at secondary school



The Welsh Language Use Surveys of 2004-06 showed that 95 per cent of fluent Welsh speakers studied Welsh always or mainly through the medium of Welsh. 68 per cent and 65

per cent respectively studied mathematics and science always or mainly through the medium of Welsh.

Fewer than 9 per cent of young people who were not fluent studied any subject always or mainly through the medium of Welsh, with the exception of Welsh itself as a subject. 56 per cent of Welsh speakers who were not fluent studied Welsh through the medium of Welsh; this is consistent with the Welsh Language Use Surveys of 2004-06.

15 per cent of those who studied mathematics, science and Welsh always or mainly through the medium of Welsh stated that they were not fluent. Looking at the subjects separately, the percentage is fairly similar for mathematics and also for science. However, just over half of those studying Welsh (first and second language) always or mainly through the medium of Welsh stated that they were not fluent.

12. In what situations do Welsh speakers speak the language?

12.1. Main findings

Young people are more likely to speak Welsh at school than with their friends or at home

- 21 per cent of all Welsh speakers always or almost always speak Welsh at home. This rises to 43 per cent amongst fluent Welsh speakers. This percentage increases steadily with age, from 29 per cent of young people aged 3 to 15, to 56 per cent of people aged 65 and over.
- 67 per cent of young people aged 3 to 15 who are fluent in Welsh always, or almost always, speak Welsh at school. 26 per cent of this group always, or almost always, speak Welsh with their friends.
- Fewer than half of those who have learnt to speak Welsh at home, whether fluent or not fluent, always or almost always use Welsh at home.
- 57 per cent of fluent Welsh speakers have used Welsh in their last conversation with someone who is not related to them.

12.2. Speaking Welsh in a range of situations

Opportunities for using Welsh are very dependent on individuals' day-to-day circumstances. For example, family and friends' ability to speak Welsh, the area where a person lives, or his/her workplace can all influence a Welsh speaker's opportunities to use the language. For young people, school offers opportunities to speak Welsh often.

The 2011 Census showed that 41 per cent of Welsh speakers either live alone or in households where everyone could speak Welsh (Welsh Government 2013).

Adults and children and young people were asked about the language they used mainly in a range of different situations. The options in the questionnaire varied slightly for adults and children and young people, but some of them were similar. One of these was the use of Welsh at home.

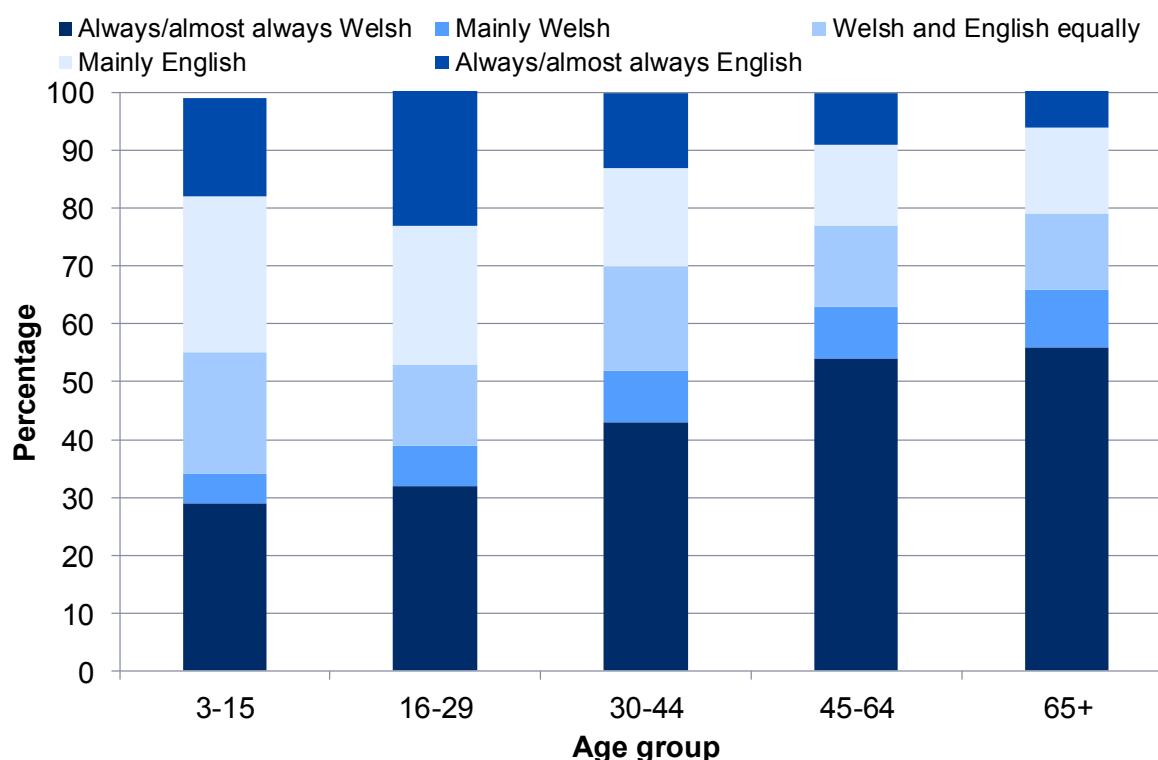
21 per cent of all Welsh speakers, either fluent or not fluent, stated that they always or almost always spoke Welsh at home. This figure increased to 43 per cent of fluent Welsh speakers. A third of all fluent Welsh speakers always or almost always spoke English, or mainly spoke English at home. A number of them may be living in homes where other members of the household cannot speak Welsh.

Of all those who learnt to speak Welsh at home, almost half always or almost always used the language at home. A further 26 per cent mainly used Welsh or made roughly equal use of Welsh and English, with the rest speaking mainly English.

Analysis according to age shows clearly that the older generation is more likely to speak Welsh at home regularly than younger people. Amongst all Welsh speakers, 11 per cent of children and young people aged 3 to 15 always spoke Welsh at home, whilst over three times as many people aged 65 and over use Welsh regularly at home. Given that we know that younger Welsh speakers are more likely to have no fluent parents than any other age group, it is unsurprising that they are less likely to speak Welsh at home than any other age group.

The pattern is fairly similar when looking at fluent Welsh speakers only, but the generation difference is not as substantial.

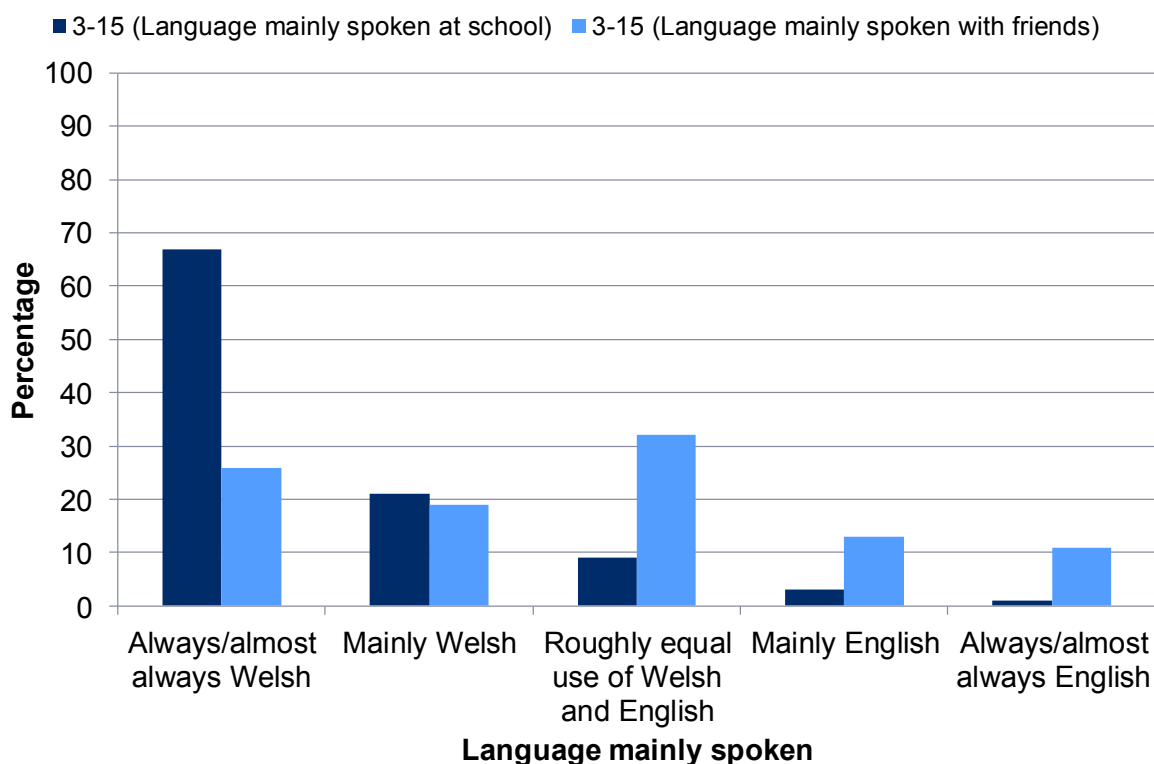
Figure 28: Language spoken at home by fluent Welsh speakers by age



Children and young people aged 3 to 15 were far more likely to always or almost always speak Welsh, or mainly speak Welsh at school than at home, with 30 per cent of them always or almost always speaking Welsh at school. In terms of fluent Welsh-speaking children and young people only, 67 per cent always or almost always used Welsh at school, but this decreased substantially when they were talking with their friends. The school's medium of teaching influences children and young people's use of the Welsh language at school, with Welsh-medium and bilingual schools offering opportunities for Welsh speakers to use the language regularly during lessons.

Just over a quarter of children and young people aged 3 to 15 who could speak Welsh fluently always or almost always spoke Welsh with their friends, whilst just over half of them mainly spoke Welsh with their friends or made equal use of both languages. It must be borne in mind, of course, that fluent Welsh speakers probably have friends who cannot speak Welsh, which is likely to influence the language of communication particularly within group situations.

Figure 29: Language mainly spoken by fluent children and young people aged 3 to 15 with friends and at school



The percentage of fluent Welsh speakers who always spoke Welsh with their friends was lower amongst the 16 to 29 age group than the 3 to 15 age group. The percentage was higher amongst the older age groups, where a quarter or more of fluent Welsh speakers spoke Welsh daily with their friends among the age groups aged 20 and over.

Adults were asked an additional question about the language they had used the last time they had spoken to someone who was not a member of their family. 32 per cent of all Welsh speakers noted that their most recent conversation had been in Welsh. In 2004-06, 41 per cent of Welsh speakers had noted this, revealing a 9 percentage point decrease between the two surveys influenced by the increase seen in non-fluent Welsh speakers.

The proportion of Welsh speakers who said that their most recent conversation had been in Welsh increased steadily with age, from 22 per cent amongst the 16 to 29 age group to 45 per cent amongst the 65 and over age group.

57 per cent of fluent Welsh speakers said that their most recent conversation had been in Welsh, which is consistent with the 2004-06 results when 59 per cent noted that their most

recent conversation had been in Welsh. 5 per cent of Welsh speakers who were not fluent stated that their most recent conversation had been in Welsh.

13. Welsh language use in the community

13.1. Main findings

Fluent Welsh speakers are far more likely to attend a social, cultural or sporting event held in Welsh than those who are less fluent.

- 43 per cent of Welsh speakers have attended a social or cultural event or activity held in Welsh during the previous year, and 19 per cent have attended a sporting event or activity held in Welsh.
- The information suggests that young people are not totally dependent on schools to arrange for them to attend a cultural event or a sporting activity held through the medium of Welsh.

13.2. Attendance at social, cultural or sporting events held in Welsh

The survey asked to what extent young people and adults attended cultural and sporting events held through the medium of Welsh. Young people were asked two separate questions about attending events or activities held in Welsh; one about events organised by their school, and the other about events not organised by their school.

This information offers a better understanding of the social use of Welsh beyond the school or the home. It is also likely that Welsh speakers use Welsh at events which are not held through the medium of Welsh or targeted at Welsh speakers. The survey did not collect information about that.

During 2014-15, Bangor University undertook a research study on behalf of Welsh Government exploring language use patterns in communities in Wales, and some of the factors associated with the vitality of Welsh as a community language. One of the findings of the research study was that not everyone questioned attended community activities in

Welsh. For many respondents, community interaction in Welsh was based, rather, on day-to-day activity such as shopping and accessing services (Welsh Government 2015c).

Information about attending events held through the medium of Welsh is also available in the Welsh Government's annual reports on the implementation of its Welsh Language Strategy. One of the strategic objectives of this strategy is to strengthen the position of the Welsh language within the community. In the annual reports, administrative information is used to report on those who have attended events held in Welsh, and such information is provided by the Welsh Government's funding partners such as Urdd Gobaith Cymru and the Welsh Language Initiatives (*Mentrau Iaith*).

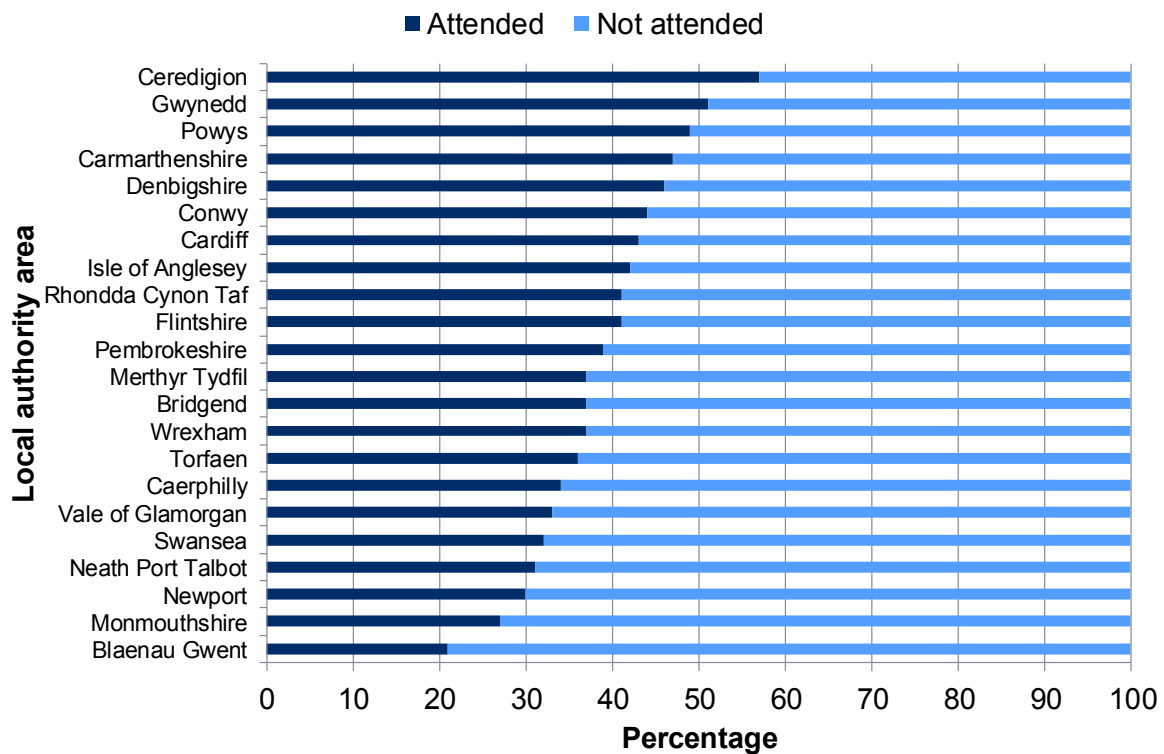
The numbers attending such events vary each year for reasons which are not directly linked to language, for example the weather can affect how many people attend outdoor events. It is therefore important to consider the availability and accessibility of such events when analysing the survey information, as the level of activity in communities varies from area to area.

The Arts in Wales Survey also measures attendance rates at arts events and participation in the arts, together with attitudes to the arts. This includes information about attendance at Welsh language events. The survey is held once every five years and the latest data dates back to 2010 (Arts Council Wales 2010). The results of the 2015 Arts in Wales Survey will be published in June 2016 – these will be the last results of the survey as it will be combined with the National Survey for Wales in 2016-17.

43 per cent of all adults who speak Welsh had attended a social or cultural event or activity held in Welsh during the previous year. This increased to 56 per cent amongst fluent Welsh speakers. The 2010 Arts in Wales Survey stated that 16 per cent of adults in Wales had attended a Welsh language event during the previous 12 months, which increased to 42 per cent amongst those who could speak Welsh 'fluently' or speak 'a fair amount' of Welsh.

In 20 of the 22 local authority areas, three in ten Welsh-speaking adults stated that they had attended a social or cultural event held in Welsh during the previous year. Blaenau Gwent and Monmouthshire were the only areas where fewer than three in ten Welsh-speaking adults had attended such an event. However, this does not necessarily mean that the event itself was held within those areas, and is therefore not indicative of provision in a specific authority.

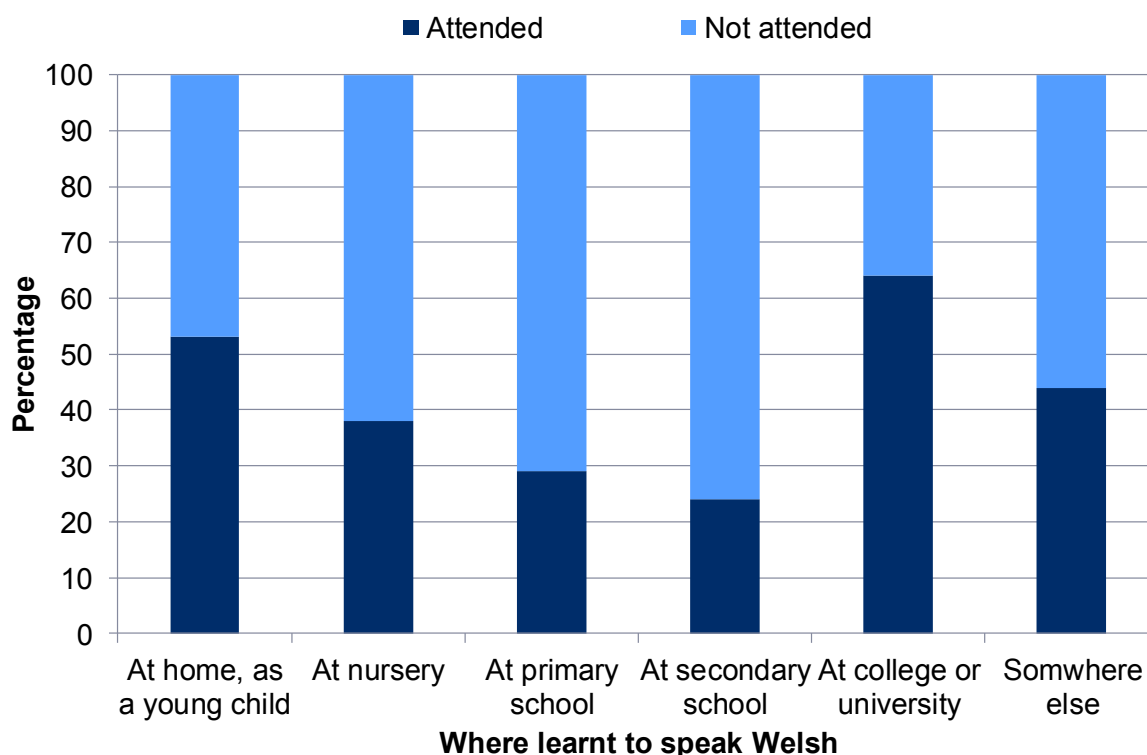
Figure 30: Attendance at a social or cultural event held in Welsh, by local authority area



On average, adults who defined themselves as fluent Welsh speakers were twice as likely to have attended a social or cultural event held in Welsh than less fluent Welsh-speaking adults, and almost three times as likely to have attended a sporting activity held in Welsh.

Adults who had learnt Welsh at home as children were slightly more likely to have attended a cultural or social event held in Welsh than those who had learnt Welsh through the education sector. 64 per cent of adults who had learnt Welsh at college or university and 44 per cent of those who had learnt to speak Welsh as an adult had attended such an event. This was not repeated to the same extent with Welsh-medium sporting activities.

Figure 31: Attendance at a social or cultural event, by where Welsh was learnt



The proportion of those who had attended a social or cultural event held in Welsh in the previous year increased slightly with age. The figure decreased slightly with age for sporting events.

The percentage of Welsh-speaking adults who had attended a sporting activity or event held in Welsh was lower than the proportion of those who had attended Welsh-medium cultural events. 19 per cent of adults who spoke Welsh stated that they had attended a sporting activity held in Welsh during the previous year.

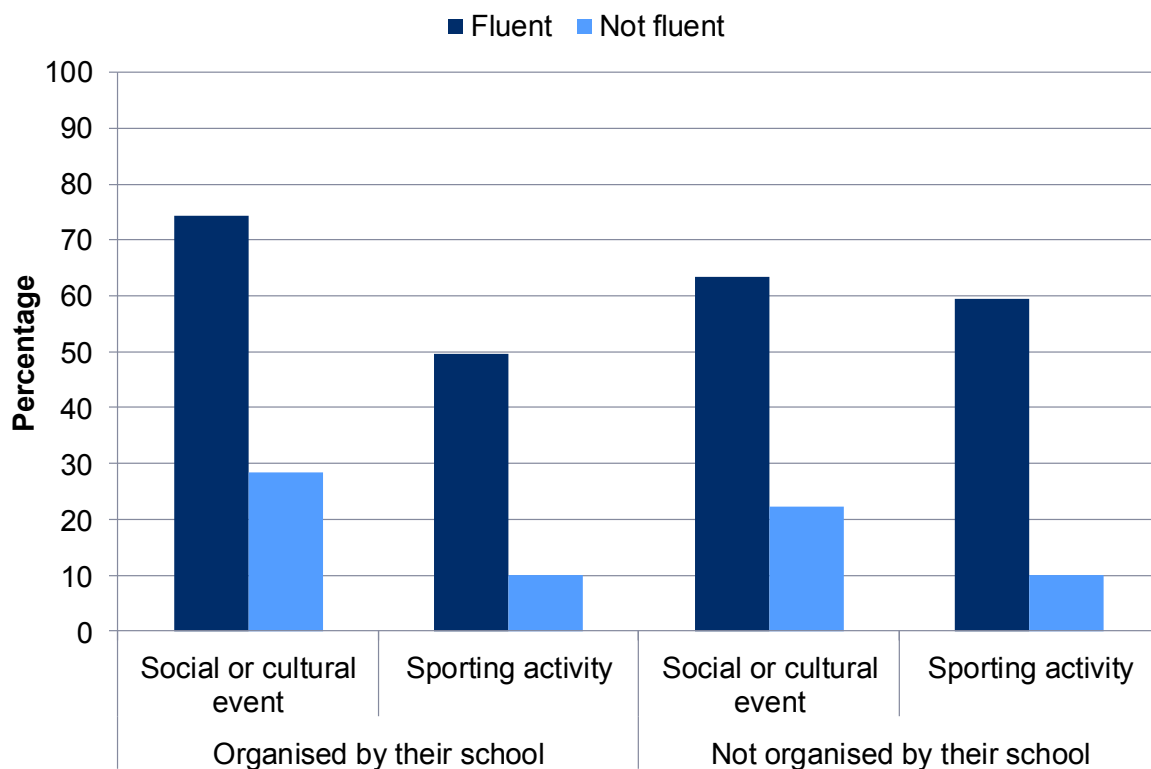
The questions asked to young people aged 3 to 15 provide an insight into the extent to which the Welsh language features in the social life of children and young people, and the extent to which their use of Welsh is dependent on activities organised by schools.

Fewer than half of all Welsh speakers aged 3 to 15 stated that they had attended a social or cultural event or activity held in Welsh organised by the school outside school hours. During the previous year, 37 per cent of Welsh speakers aged 3 to 15 had attended a cultural event held in Welsh which had not been organised by the school.

There was a slightly smaller difference between the percentage of young people who had attended sporting events or activities held in Welsh, 28 per cent, and the percentage of those who had attended such events which had not been organised by the school, 24 per cent. This means that almost one in four Welsh-speaking children and young people had attended a sporting event or activity held in Welsh in the previous year, either organised by the school or not. Despite this, the information suggests that young people are not totally dependent on schools to arrange for them to attend cultural events or sporting activities held in Welsh.

The figure below compares the percentage of fluent and non-fluent Welsh-speaking young people who had attended Welsh medium events, either organised by the school or not.

Figure 32: Proportion of young people who had attended a social, cultural or sporting event held in Welsh, by fluency



There was a substantial difference between the percentage of fluent Welsh-speaking young people who had attended a cultural or sporting event or activity held in Welsh, and the percentage of young people who did not speak Welsh fluently who had attended such an event. 74 per cent of fluent Welsh speakers had attended a cultural event organised by their school compared to 28 per cent of non-fluent Welsh speakers. 59 per cent of fluent Welsh

speakers had attended a sporting event organised by the school compared to 10 per cent of non-fluent Welsh speakers.

14. Texting, e-mailing and using social media

14.1. Main findings

In the context of this section, references to Welsh language use on digital media includes the use of Welsh always or almost always, mainly Welsh, or roughly equal use of Welsh and English on digital media. It is possible that respondents that stated that they use ‘mainly English’ or ‘always/almost always English’ also use some Welsh. However, as it is not possible to know for certain that it is Welsh (and not any other language) that is used along with English in these cases; these two groups have not been included in the analysis.

Just over a quarter of all Welsh speakers who text use at least as much Welsh as English to send text messages from a mobile phone to friends.

- This increases to just over a half of fluent Welsh speakers who use at least as much Welsh as English when sending text messages.
- 18 per cent of all Welsh speakers aged 16 and over who use Facebook do so at least as much in Welsh as in English, whilst 12 per cent use at least as much Welsh as English on Twitter.

14.2. Sending text message and e-mails in Welsh and using social networking sites in Welsh

Information was collected which had not been collected in the previous Welsh Language Use Surveys about the extent to which the Welsh language is used by young people and adults on social media sites, through texting and emailing their friends. Comparisons can therefore not be made with the Welsh Language Use Surveys of 2004-06.

One of the Welsh Government’s strategic objectives is to strengthen the Welsh language infrastructure, ensuring that more tools and resources are available for promoting the use of Welsh, including in digital domains. One of the Commissioner’s strategic goals is to co-ordinate Welsh language infrastructure developments so that individuals and organisations

of all types can offer provision through the medium of Welsh. This includes information technology which supports the Welsh language.

Following feedback from stakeholders and the general public following the publication of the first year results of the survey, this report now focuses on Welsh speakers who use some Welsh on social media, when texting and emailing, rather than those who use Welsh only. The reason for this is that Welsh speakers who use social media are very likely to exchange messages with a range of users who have different language abilities and different habits in terms of using the Welsh language.

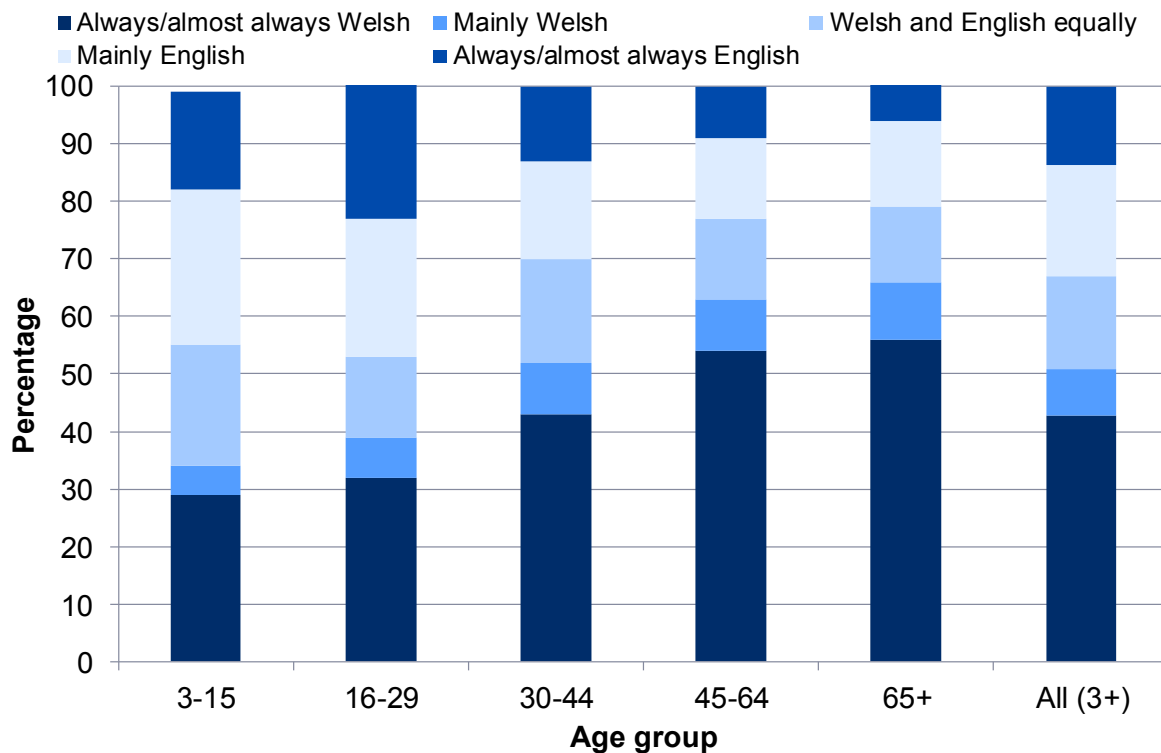
Some activities on social networks are aimed at mixed language audiences; many of these activities do not involve one-to-one communication. The dynamics of social networks can therefore influence the use of language.

Research commissioned by BBC Cymru Wales, S4C and the Welsh Government has shown that people consider several factors when deciding whether or not to use Welsh on platforms such as Facebook. One factor, for example, is the language of the audience viewing the content. A number stated that they did not consider using Welsh on Facebook because their range of friends included people who were not Welsh speakers (BBC Cymru Wales, S4C and Welsh Government 2013).

Just over a quarter of all respondents who send text messages, whatever their Welsh language ability, use Welsh to send messages to their friends. Almost two out of three of those who stated that they use Welsh with friends said that they use Welsh to send text messages to friends.

Over a half of fluent Welsh speakers stated that they send text messages in Welsh, compared to three per cent of those who are not fluent. Those who had learnt Welsh at home are far more likely to use Welsh when sending messages to friends than those who had learnt Welsh in other places.

Figure 33: Use of the Welsh language on mobile phones when communicating with friends, by fluency and age



Fluent Welsh speakers were therefore the most likely to use Welsh when sending messages on their mobile phones. Looking specifically at fluent Welsh speakers by age group, 45 per cent of people aged between 16 and 29 used Welsh to send text messages. However a higher percentage of older fluent respondents used Welsh when sending text messages to their friends, with over a half in all groups over the age of 30 doing so. The use of Welsh for sending text messages amongst the 3 to 15 age group is not included in the analysis as many of the youngest children are unlikely to have access to the technology that would enable them to send text messages or e-mails.

20 per cent of all Welsh speakers who send e-mails to friends use Welsh, which is slightly lower than the percentage of Welsh speakers who send text messages in Welsh to friends. However, this percentage increases to 44 per cent amongst fluent Welsh speakers. A similar pattern is evident when analysing the results based on fluency and age, with the older age groups more likely to use Welsh when e-mailing friends.

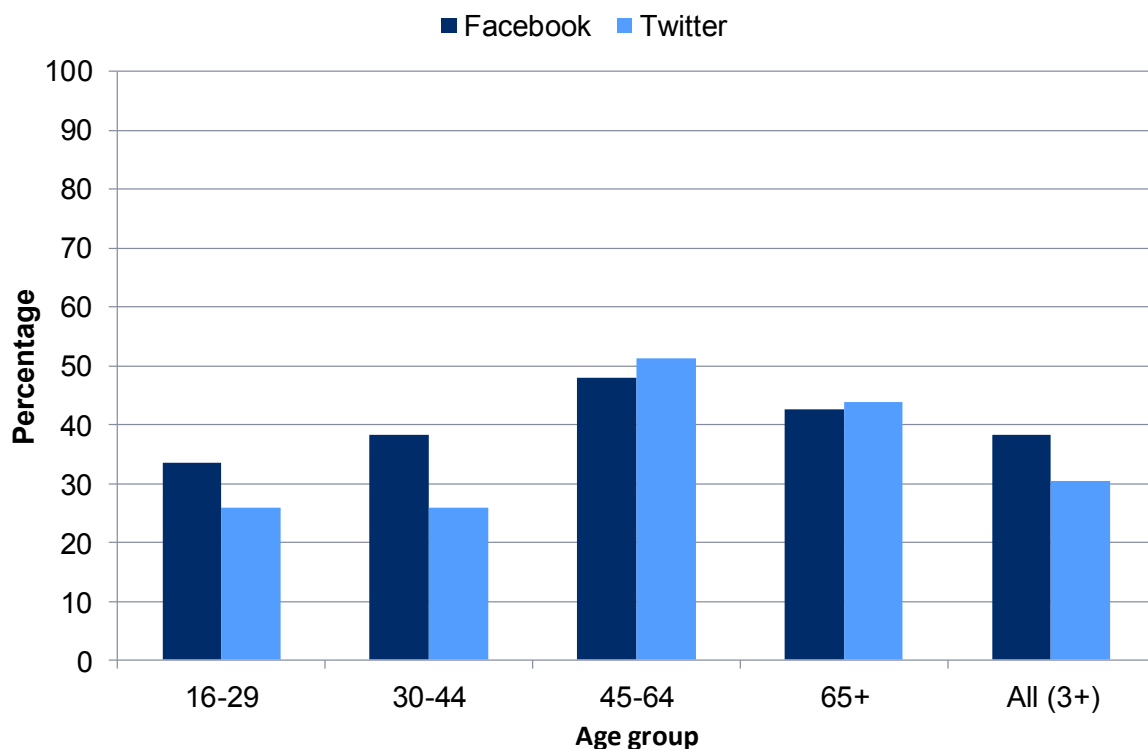
The adults and children and young people questionnaires were slightly different, with the adults' questionnaire asking specifically about the use of Welsh on Facebook and Twitter

specifically, and the children and young people’s questionnaire asking about wider use on social networks.

In terms of the use of Welsh on Facebook, which mainly involves a network of friends and family, 18 per cent of all Welsh speakers who use Facebook used Welsh. 12 per cent who use Twitter used Welsh, which is a much wider network in terms of the nature of contacts. The differences between the audience and format of these networks probably influence the use of Welsh, similar to what was noted in BBC Cymru Wales, S4C and Welsh Government’s research (BBC Cymru Wales, S4C and Welsh Government 2013).

Fluent Welsh speakers were more likely than non-fluent Welsh speakers to use Welsh on Facebook and Twitter, with almost two in five using Welsh and over three in every ten on Twitter. Although fewer older fluent Welsh speakers use social networks than younger people, older people were slightly more likely to use Welsh on these networks.

Figure 34: Percentage of fluent Welsh speakers using Welsh at least as much as English to write on Facebook and Twitter by age group



Welsh speakers who have learnt to speak Welsh at home as young children were much more likely than those who have learnt to speak Welsh at school to use the language on

social networks. Amongst adults who use Facebook, 42 per cent of those who learnt to speak Welsh at home used Welsh on Facebook, compared to 10 per cent of those who learnt to speak Welsh at nursery school and 4 per cent of those who learnt to speak Welsh at primary school.

An individual's ability to write in Welsh also appeared to have an influence on use; for example, almost a half of all Welsh speakers who stated that they could write in Welsh very well used Welsh on Facebook.

Only a very small number of people who were not fluent used digital media through the medium of Welsh.

Over a third of young people who always or almost always spoke Welsh with friends used Welsh on networks such as Facebook and Bebo. 4 per cent of those who always spoke English with their friends used Welsh on social networks.

There is also a link between frequency of Welsh language use and the use of Welsh online amongst young people. Welsh speakers who speak the language daily are much more likely to use Welsh on social networks than other Welsh speakers.

15. Dealing with public organisations in Welsh

15.1. Main findings

Just over half of Welsh speakers try to use Welsh, at least occasionally, when dealing with public organisations.

- Welsh speakers who speak the language daily are twice as likely to try to use Welsh when dealing with public organisations as those who speak Welsh less often.
- The majority of those who try to use Welsh occasionally with public organisations succeed at least sometimes when using Welsh, for example by speaking to someone in Welsh or obtaining materials in Welsh.
- Of those who always try to use Welsh with public organisations, just over half feel that they always or almost always succeed.
- Nine in ten Welsh speakers who always speak Welsh with people from outside the company or organisation try to use Welsh with public organisations at least sometimes.

15.2. Attempting to use Welsh when dealing with public organisations

One of the main aims of the Welsh Language Commissioner is to promote and facilitate the use of Welsh and to work towards increasing the use of Welsh in relation to the provision of services. The Welsh Language Standards establish a new framework of statutory duties in relation to the Welsh language for organisations in Wales. The standards make it clearer to organisations what their duties are with regards to the Welsh language. They also make it clearer for Welsh speakers what services they can expect to receive in Welsh and ensure consistency regarding services in Welsh in Wales.

Only adults were asked to what extent they used Welsh in public or official contexts. This information compares their efforts to speak Welsh with their actual use of the language.

This survey provides a picture of the individual's experience when using Welsh language services. It is important to note that the availability of Welsh language services varies considerably on a geographical basis and from organisation to organisation. The survey did

not ask about what motivates or restricts the use of Welsh when dealing with public organisations.

Recent research conducted by the Citizen's Advice Bureau highlighted some barriers to the use of Welsh language services. The research found that a range of complex factors influenced on people's use of Welsh language services, including barriers which made it more difficult to use services in Welsh than in English, barriers in terms of people's confidence in their language skills, and their general perceptions of Welsh language services (Citizens Advice 2015).

Some additional information is available about the use of Welsh language services from administrative sources, such as telephone calls to NHS Direct, higher education applications or responses to official questionnaires. However, there are a number of difficulties in terms of the standard of some of these administrative systems, such as documenting recording the information or the ability of the systems to report the necessary information. There is also a problem with data continuity owing to system changes. This survey therefore offers a more complete picture of the use of the Welsh language with public organisations.

Just over half of Welsh-speaking adults tried to use Welsh, at least occasionally, when dealing with public organisations such as county councils. This percentage increased to 79 per cent amongst fluent Welsh speakers.

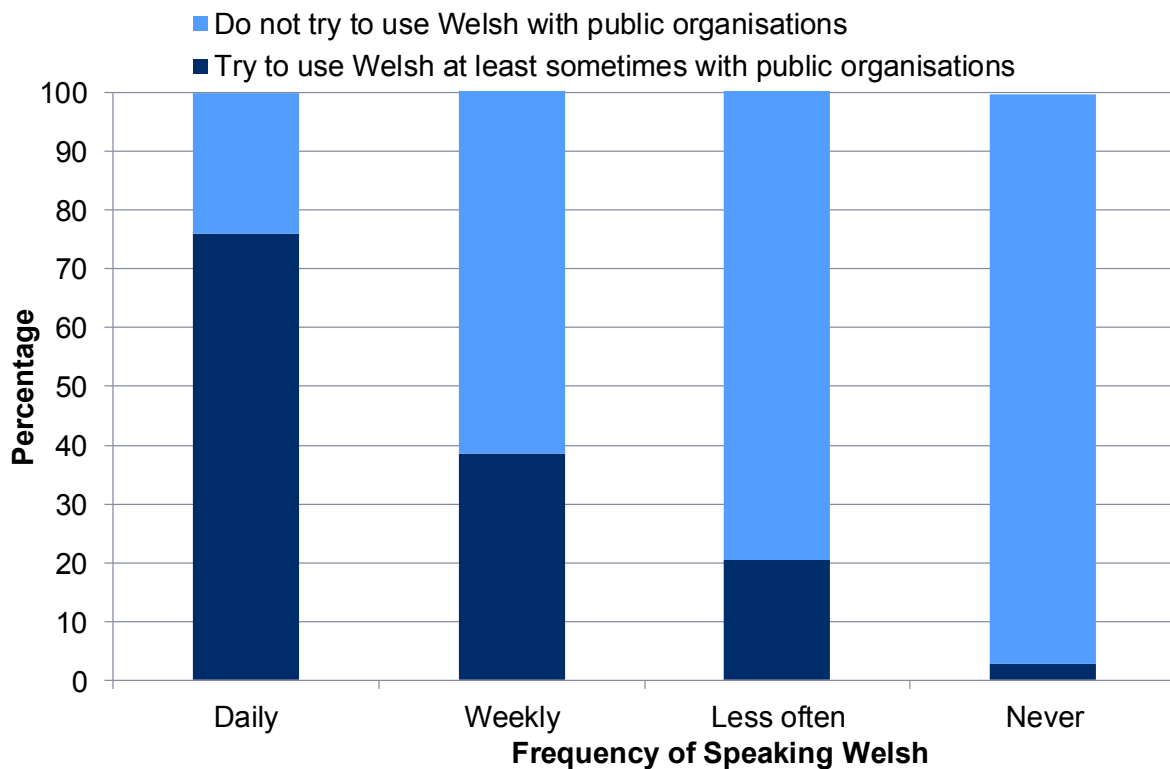
Whilst older Welsh speakers were more likely than younger ones to try to deal with public organisations through the medium of Welsh, age does not appear to influence success in using Welsh with public organisations. Older people were more likely to try to use Welsh when dealing with public organisations, with 57 per cent of people aged 65 and over trying to use Welsh with public organisations at least sometimes or more often, compared to 44 per cent of people aged between 16 and 29.

When looking at the data by local authority area, it is important to note that the data represents the area where the respondent lives rather than the area where the public organisation is located. An individual may deal with public organisations outside the area where he/she lives.

In six local authority areas fewer than 30 per cent of Welsh-speaking adults used Welsh at least sometimes when dealing with public services. The six areas were in south-east Wales.

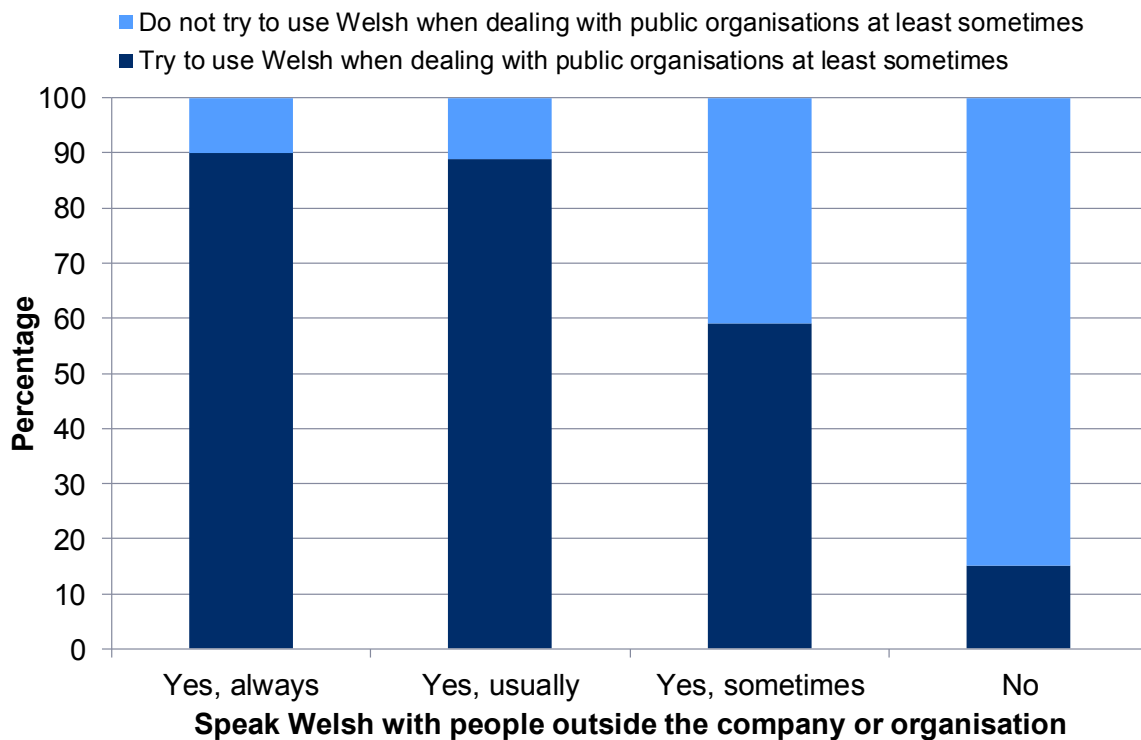
Welsh speakers who spoke Welsh daily were twice as likely as those who spoke Welsh weekly to try to use Welsh when dealing with public organisations. 26 per cent of people who spoke Welsh daily stated that they always tried to use Welsh with public organisations.

Figure 35: Attempting to use Welsh with public organisations by frequency of Welsh speaking



There appears to be a correlation between people’s use of Welsh in the workplace and their use of Welsh when dealing with public organisations. Those in employment were asked about their language of communication in an official capacity with people from outside their company or organisation. Of those who stated that they always spoke Welsh with people from outside the company or organisation, 90 per cent said that they tried to use Welsh with public organisations at least sometimes, and 57 per cent said that they always tried to use Welsh with public organisations. 89 per cent of those who usually tried to use Welsh with people from outside the company or organisation also used it at least occasionally when dealing with public organisations.

Figure 36: Attempting to use Welsh with public organisations by use of Welsh in an official capacity



The survey also asked about the use of Welsh to complete official forms. 37 per cent tried to do this at least sometimes, and this percentage increased to 63 per cent amongst fluent Welsh speakers.

Again, there appears to be a correlation between frequency of speaking Welsh and the likelihood of an individual trying to complete an official form in Welsh, with 60 per cent of Welsh speakers who spoke Welsh daily completing forms in Welsh sometimes or more often, compared to 22 per cent of those who spoke Welsh weekly, and 11 per cent who spoke Welsh less often.

Welsh speakers who write in Welsh at work at least sometimes were also far more likely to try to use Welsh to complete official forms. 61 per cent of adults who write something in Welsh at work also tried to complete official forms in Welsh. 15 per cent of these people always tried to complete official forms in Welsh. It's possible that writing regularly in Welsh at work may help develop confidence to deal with official documents in Welsh outside the workplace.

Welsh speakers who were able to write very well or well in Welsh were far more likely than those who could not write well in Welsh to try to complete official forms in Welsh.

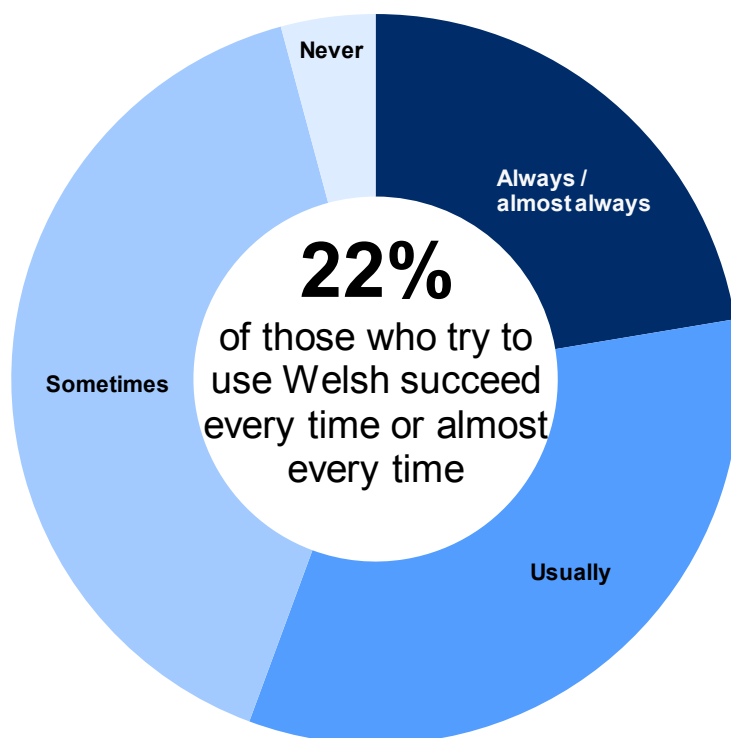
As regards the Welsh Language Use Survey 2013-2015 itself, 23 per cent of respondents completed the survey in Welsh. Of those who stated that they always or almost always tried to use Welsh to complete official forms, 84 per cent actually completed this survey in Welsh.

15.3. Success in using Welsh when dealing with public organisations

The survey asked how often individuals succeeded in using Welsh when dealing with public organisations, for example, either by speaking to someone in Welsh or obtaining materials in Welsh. In this context, people's perception of success might depend to an extent on an individual's expectations when dealing with organisations in Welsh, and this should be borne in mind when analysing the results.

96 per cent of those who tried to use Welsh at least sometimes felt that they succeeded at least sometimes when using Welsh with public organisations. One in five, 22 per cent, felt that they were always or almost always successful.

Figure 37: Success when trying to use Welsh with public organisations



Of those individuals who always tried to use Welsh with public organisations, a little over half, 54 per cent, felt that they were always or almost always successful, and 29 per cent were usually successful. Of those individuals who usually requested a Welsh language service, 16 per cent always or almost always succeeded in using Welsh.

Individuals who spoke Welsh daily were three times more likely to state that they always or almost always succeeded in using Welsh when dealing with public organisations than those who spoke Welsh weekly. One possible reason for this is that Welsh speakers who use the Welsh language daily are more likely to always or usually request a service in Welsh, and are therefore more likely to receive a Welsh language service from an organisation.

A similar question was asked relating to frequency of success when completing official forms. Again, a high proportion stated that they succeeded to an extent with this process, with 98 per cent stating that they were successful at least sometimes. 19 per cent stated that they were always or almost always successful when using Welsh to complete official forms.

16. Welsh language use at work

16.1. Main findings

Two thirds of Welsh speakers in work speak Welsh at least sometimes with their work colleagues. A similar percentage speak Welsh with people outside their organisation in an official capacity.

- A higher percentage, 81 per cent, use Welsh at least sometimes with colleagues in workplaces where their employer is supportive of the use of Welsh in most aspects of the business.
- Almost two thirds of all Welsh speakers, whatever their fluency levels, speak Welsh with people outside the company or organisation whilst at work.
- Welsh speakers working in the public sector are slightly more likely to use Welsh with colleagues than Welsh speakers working in the private sector.

16.2. Welsh in the workplace

Adults who work were asked a series of questions about the degree to which they used Welsh in the workplace and how the language is treated and perceived within their workplaces. The questions in this section asked whether the respondent spoke Welsh with colleagues or people outside their organisation, and whether they wrote anything in Welsh at work. Questions were also asked about whether the employer offers anything to wear to indicate that Welsh speakers can speak Welsh, and about their employer's support of the Welsh language.

The UK Commission for Employment and Skills' Employer Skills Survey provides key information about the demand for labour amongst employers, skills shortages (including Welsh language skills), and investment levels in training and workforce development. The 2013 Employer Skills Survey noted that a shortage of spoken and written Welsh language skills was a problem in just over a quarter of all skills gaps.

In 2013 a survey of over 4,000 employers in Wales operating in eight sectors was also conducted, to provide accurate, reliable information on the current and future Welsh

language skills needs of employers. According to the survey, employers estimated that almost a quarter of all staff had some level of Welsh language skills, and 14 per cent of all staff used Welsh at work (Welsh Government 2014b).

One third of Welsh speakers who worked stated that they did not speak Welsh with colleagues, whilst the rest said that they spoke Welsh with their colleagues at least sometimes. Almost one in five Welsh speakers who worked always spoke Welsh with their colleagues.

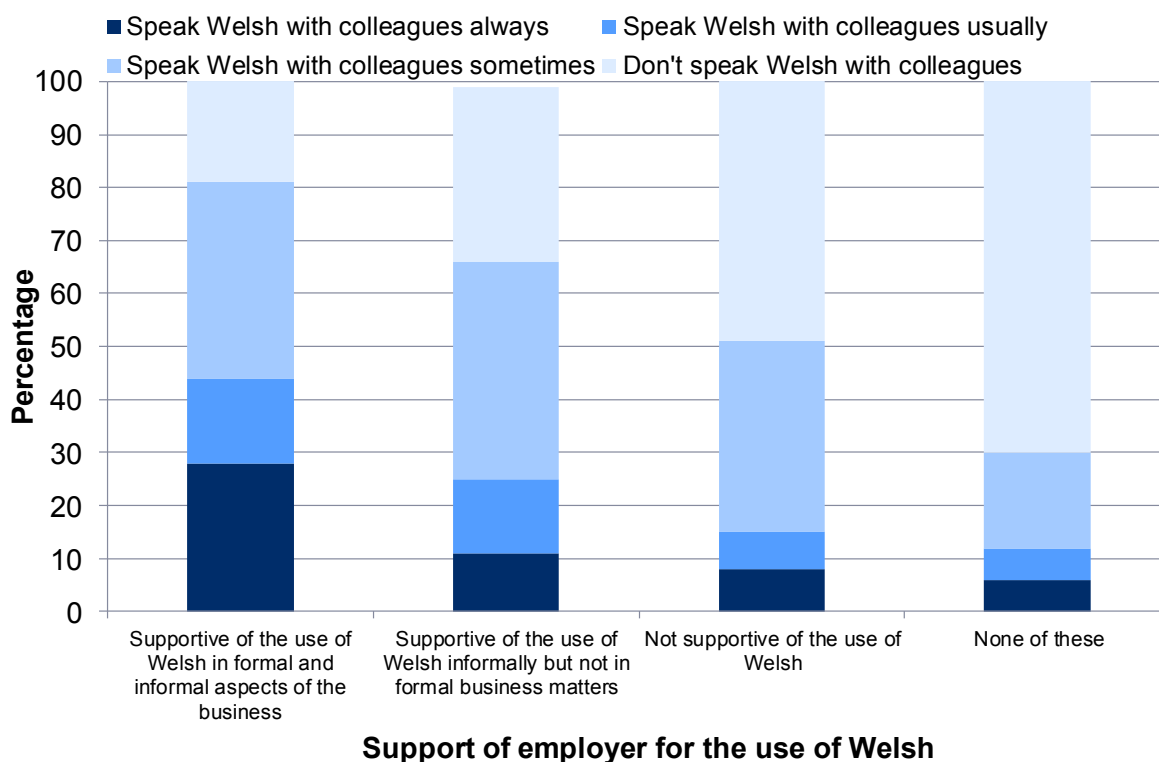
It must be noted that this question made no distinction between the contexts of conversations amongst colleagues, i.e. whether they were conversations about job-specific matters ('language of work'), informal conversations ('language at work'), or both. It is not possible either to analyse by the number of colleagues who speak Welsh within the workplace.

When looking at fluent Welsh speakers only, the percentage of people who said that they always spoke Welsh with their colleagues increased substantially, with 35 per cent always doing so. Half of fluent Welsh speakers usually or sometimes spoke Welsh with their colleagues. Although only a small percentage of non-fluent Welsh speakers spoke Welsh regularly with their colleagues, 42 per cent stated that they spoke Welsh with them sometimes.

Those who felt most comfortable using Welsh were very likely to communicate regularly with their colleagues in Welsh, with 58 per cent always speaking Welsh and 26 per cent usually speaking Welsh. 42 per cent of people who said that they felt most comfortable communicating in English used Welsh sometimes in the workplace with colleagues.

81 per cent of Welsh speakers used Welsh with their colleagues at least sometimes in workplaces where the employer was supportive of the use of Welsh in most aspects of the work of the business. The percentage was slightly lower amongst employees whose employers were not supportive of the use of Welsh in informal situations, whilst 51 per cent said that they spoke Welsh with their colleagues but that their employer was not supportive of the language. Of employees whose employers were not supportive of the use of Welsh, just over a half speak Welsh with their colleagues at least sometimes.

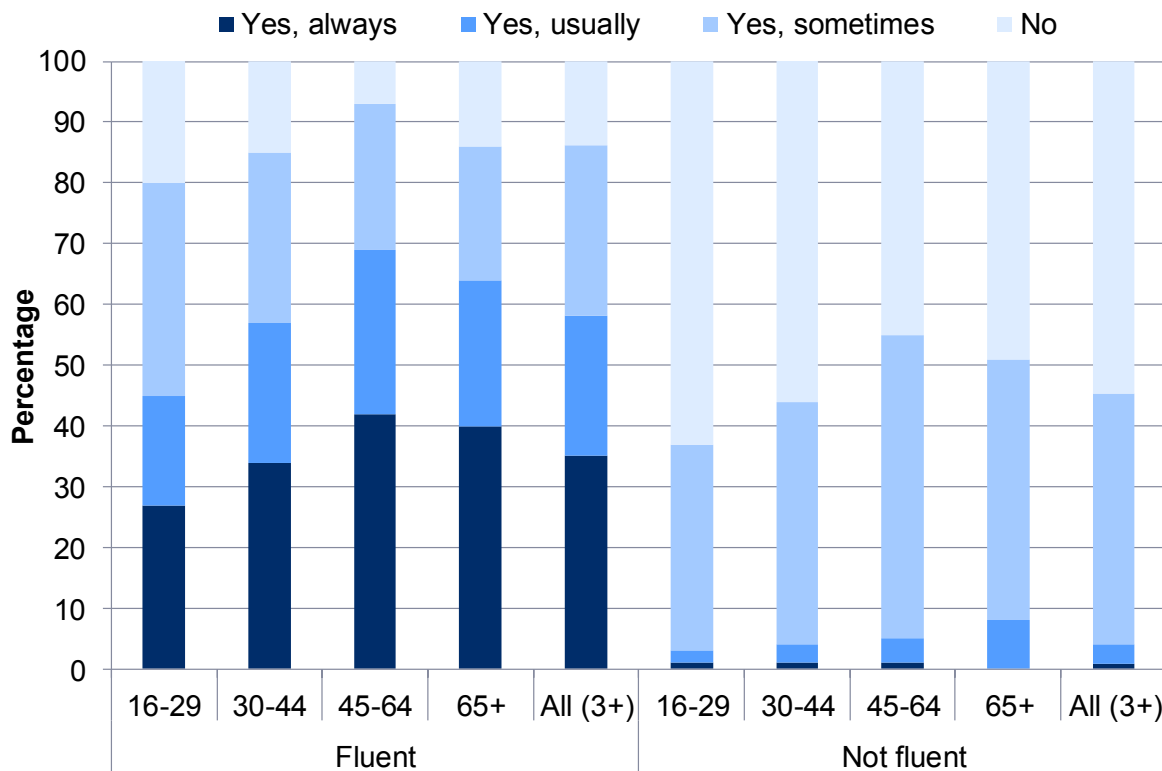
Figure 38: Support of employer by language spoken at work



Welsh speakers who worked in the public sector were slightly more likely to use Welsh with their colleagues at least sometimes, compared to Welsh speakers who worked in the private sector and the third sector. Although there was no substantial difference between the sectors, a higher percentage, 21 per cent, of people in the public sector always spoke Welsh with their colleagues, compared to 16 per cent in the private sector and 12 per cent in the third sector.

Fluent Welsh speakers and those aged 45 and over were more likely to speak Welsh with their colleagues, whilst a high percentage of non-fluent Welsh speakers, 46 per cent, spoke Welsh at least sometimes with their colleagues.

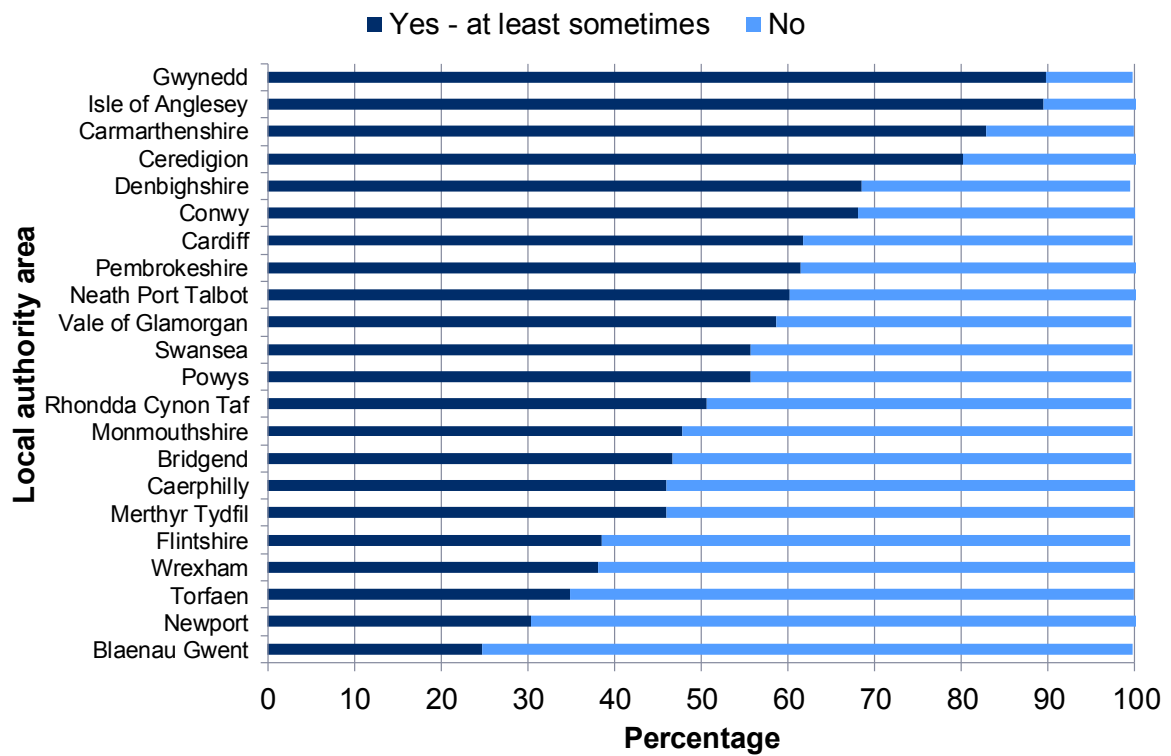
Figure 39: Percentage who speak Welsh with their colleagues, by age and fluency



The figure below shows the percentage of Welsh speakers who stated that they spoke Welsh with their colleagues based on the local authority area where the respondents live. It should be borne in mind that an individual's home location does not necessarily correspond to his/her work location.

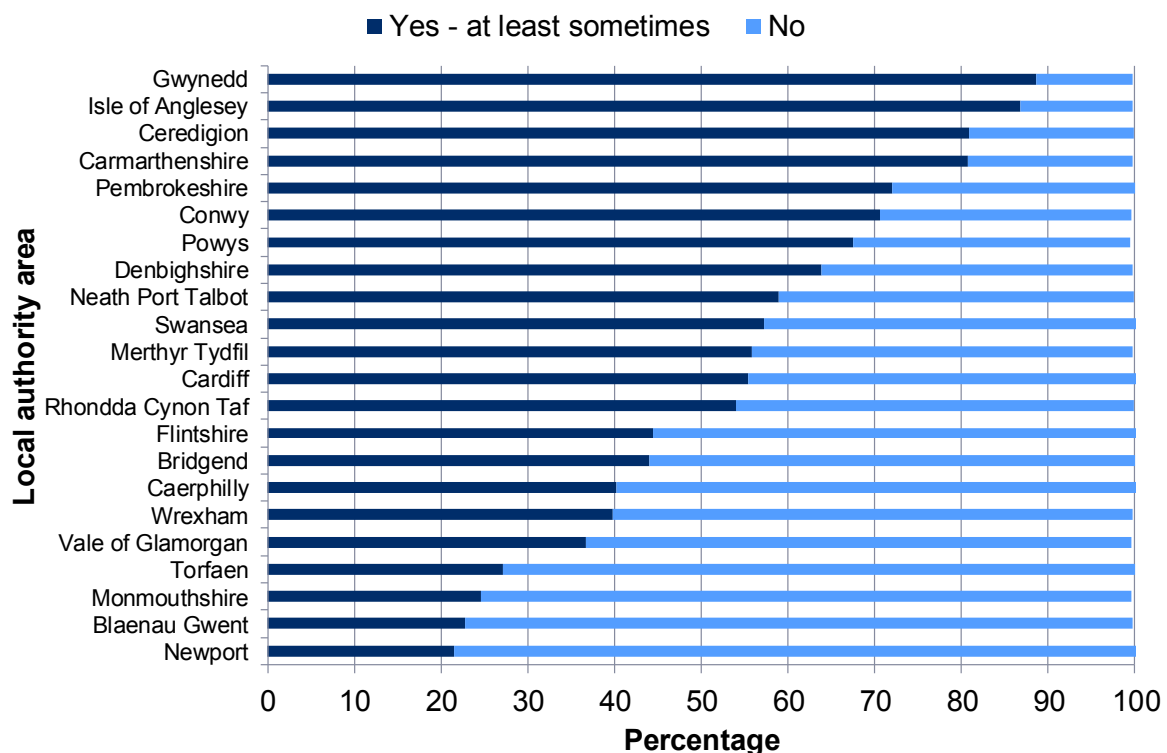
In 13 of the 22 local authority areas, over half the survey respondents stated that they used Welsh at least sometimes with their work colleagues. In Gwynedd and the Isle of Anglesey, nine out of ten Welsh speakers in work stated that they spoke Welsh with their colleagues at least sometimes. The percentage of people who said that they did not speak any Welsh with their colleagues was at its highest in those areas where the percentage of Welsh speakers was at its lowest. In Blaenau Gwent, three quarters of all Welsh speakers in work never spoke Welsh with their colleagues, and there was a similar percentage in Newport.

Figure 40: Percentage of people who speak Welsh with their colleagues by local authority area



The pattern for Welsh speakers who worked and spoke Welsh with people outside the company or organisation was similar, with the highest percentages doing so in areas with the highest percentage of Welsh speakers. In contrast, Welsh speakers made very little use of the Welsh language at work with people from outside the company or organisation in Newport, Blaenau Gwent and Monmouthshire, with a quarter or fewer speaking Welsh with people from outside the company or organisation at least sometimes.

Figure 41: Percentage of people who speak Welsh with people outside the company or organisation by local authority area

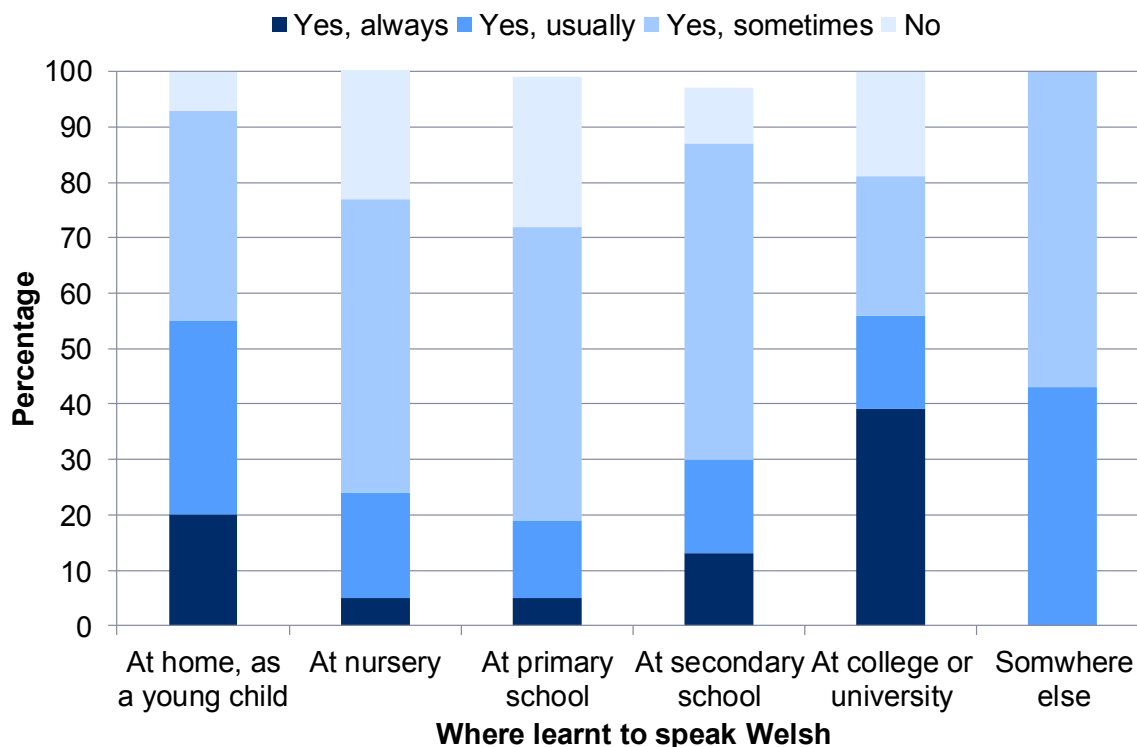


Almost two thirds of all Welsh speakers, whatever their fluency levels, spoke Welsh with people outside the company or organisation whilst at work, and just over a quarter always or usually used Welsh in an official capacity.

Fluent Welsh speakers were most likely to speak Welsh with people outside the company or organisation, with almost nine out of ten speaking Welsh at least sometimes, compared to 41 per cent of non-fluent Welsh speakers. 47 per cent of fluent Welsh speakers spoke Welsh always or usually with people outside their company or organisation.

Looking at this information based on where individuals learnt to speak Welsh and their fluency reveals a slightly different pattern. There is usually a clear link between an individual's use of Welsh and where he/she learnt to speak Welsh, with those who learnt at home far more likely to use Welsh than those who learnt it at school. Although 55 per cent of fluent Welsh speakers who learnt the language at home always or usually spoke Welsh with people from outside the company/organisation in an official capacity, 23 per cent of fluent Welsh speakers who learnt Welsh at nursery school, 19 per cent who learnt it at primary school, 33 per cent who learnt it secondary school and 56 per cent who learnt it at college or university also used Welsh in an official capacity.

Figure 42: Percentage of fluent Welsh speakers who speak Welsh with people outside the company or organisation by where Welsh was learnt



An individual's frequency of language use also appears to have an influence on his/her use of Welsh with people outside the company or organisation in a work context, with almost half of those who used Welsh daily always or usually speaking Welsh with external people, compared to 4 per cent of those who spoke Welsh weekly and 1 per cent who spoke it less often than that. This might be linked to individuals' confidence, i.e. if they did not use Welsh regularly in their daily lives they felt less confident about using it regularly at work, or perhaps they are not used to engaging with Welsh speakers in an official capacity.

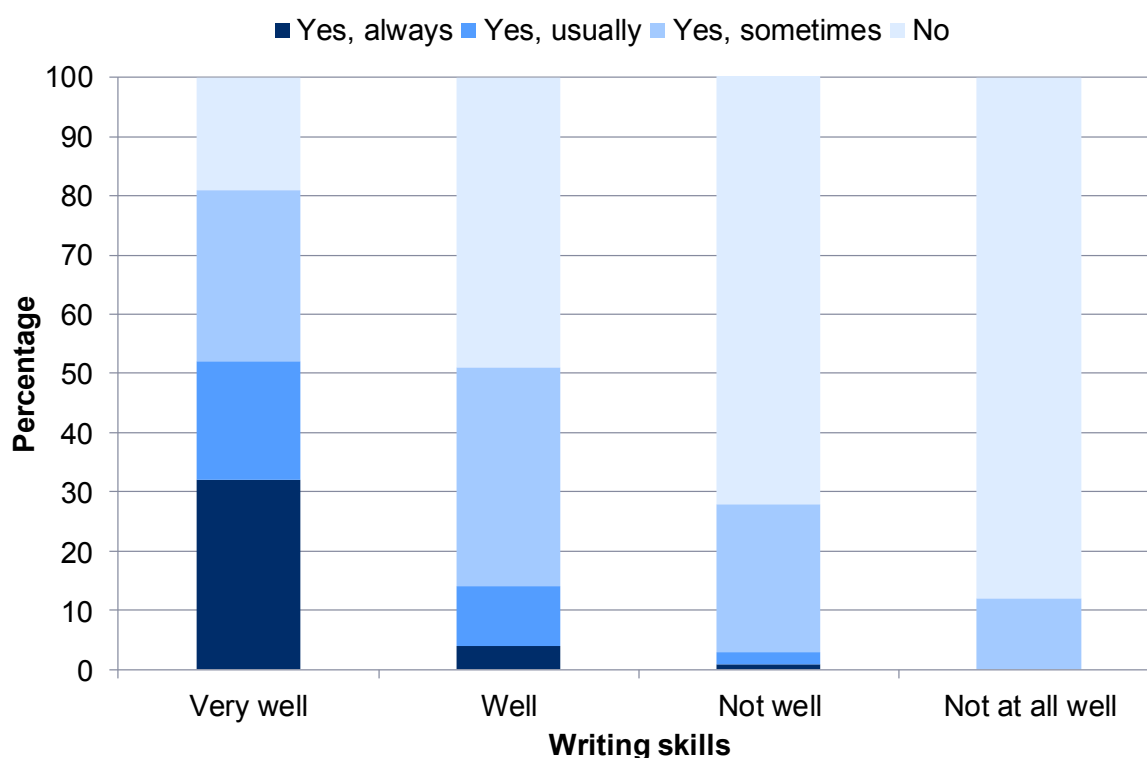
There was very little difference in people's answers based on their sector of employment, with around a quarter of people in the private and public sectors always or usually using Welsh with people outside the organisation.

In terms of written use of Welsh in the workplace, almost half stated that they write in Welsh at work. Those Welsh speakers who stated that they had very good writing ability were most likely to write in Welsh in the workplace, with 81 per cent writing something in Welsh and over a half doing so always or usually.

The Welsh Language Use Surveys of 2004-06 showed that 66 per cent of Welsh speakers who could write in Welsh very well used written Welsh in the workplace, with 38 per cent using it regularly. This is lower than the proportion in 2013-15.

The percentage of people who can write in Welsh very well and who write in Welsh at work at least sometimes was also higher in 2013-15: 51 per cent compared to 40 per cent in 2004-06, and the percentage of people who cannot write in Welsh very well remained relatively constant, with 27 per cent writing in Welsh at work at least sometimes.

Figure 43: Writing at work by writing ability



It also seems that individuals working for an employer who is supportive of the use of Welsh in formal and informal aspects of the business are far more likely to write something in Welsh. 64 per cent write something in Welsh at work at least sometimes. However, almost a third said that they wrote something in Welsh at work at least sometimes, even though they felt that their employer was not supportive of the language.

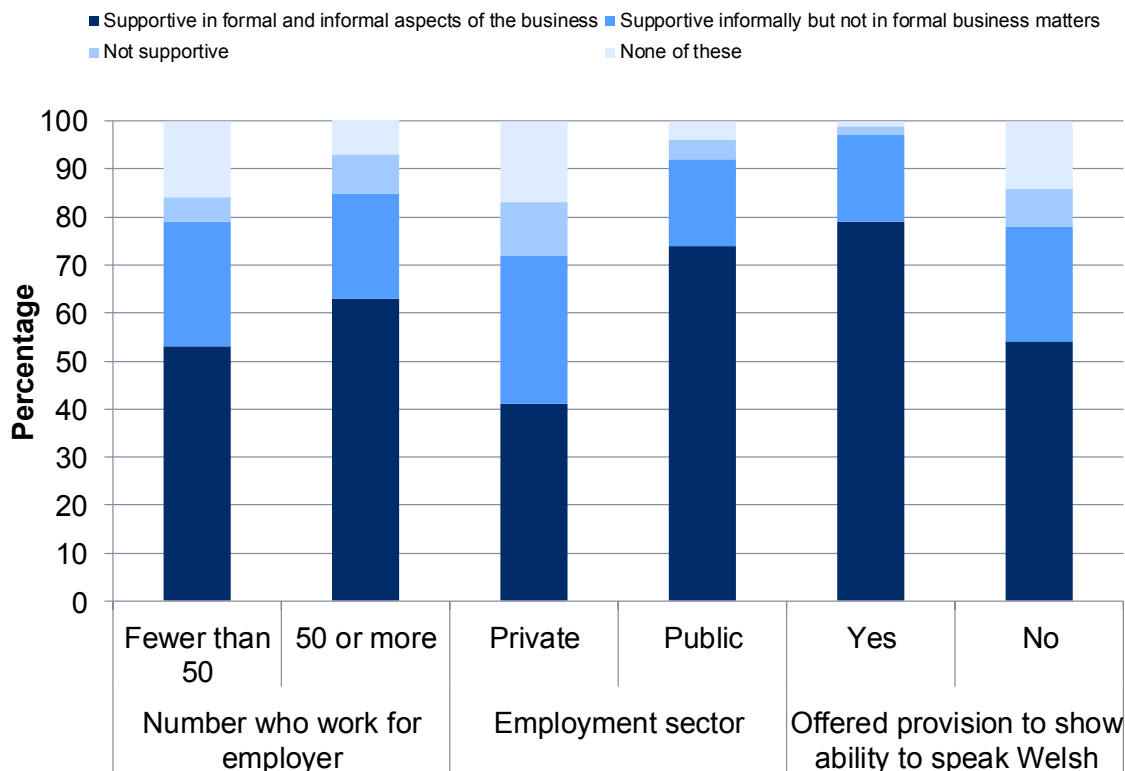
Welsh speakers who worked were asked whether they felt that their employer was supportive of the use of Welsh in formal and informal aspects of the business. Almost three out of five felt that their employer was supportive of the use of Welsh within formal and

informal aspects of the business, with over one in five stating that their employer was only supportive of Welsh for informal use within the business.

This view did not vary much according to fluency, although slightly more fluent Welsh speakers felt that their employers were supportive of the use of Welsh in all aspects of the business. However, opinions varied to a greater degree based on the sector Welsh speakers were working in and on the size of the organisation.

Almost three quarters of public sector workers felt that their employer was supportive of the formal and informal use of Welsh within the business, compared to 41 per cent in the private sector. Despite this, only just over one in ten in the private sector felt that their employer was not supportive of the use of Welsh. Workers in larger organisations, i.e. those with 50 or more members of staff, were slightly more likely to feel that their employer was supportive of the use of Welsh in all aspects of the business.

Figure 44: Perception of employers' attitude towards the Welsh language by size of organisation, employment sector and employers' actions



One in five stated that they had been offered something like a badge by their employer to indicate that they could speak Welsh. The percentage increased slightly, but not substantially, amongst fluent Welsh speakers. Individuals working for organisations with greater numbers of staff were almost three times more likely to have been offered something like a badge to indicate that they could speak Welsh than individuals working with fewer members of staff.

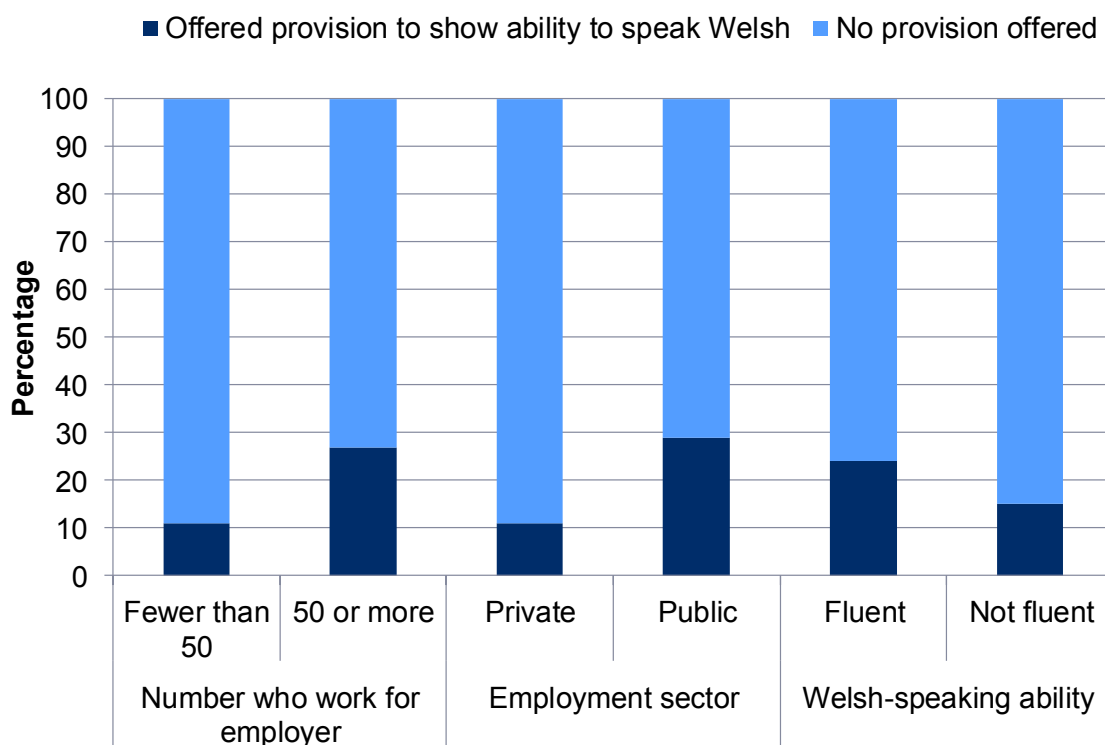
At least one in ten fluent Welsh speakers in all local authority areas had been offered something to wear to indicate that they could speak Welsh, except for those living in five local authority areas, namely Blaenau Gwent, Bridgend, the Vale of Glamorgan, Flintshire and Monmouthshire.

Where an employer had offered a badge or something else to their workers to indicate that they could speak Welsh, almost everyone felt that their employer was supportive of the use of Welsh. Respondents may have reached this conclusion about their employer based on the offer of something to wear to indicate that they could speak Welsh, such as a badge. However, 78 per cent of respondents who had not been offered something to wear to

indicate that they could speak Welsh also felt that their employer was supportive of the use of Welsh, either formally or just informally.

Welsh-speaking workers in the public sector were almost three times as likely as those in the private sector to have been offered something by their employer to indicate that they could speak Welsh.

Figure 45: Percentage who were offered something to indicate they could speak Welsh, by size of organisation, employment sector and fluency



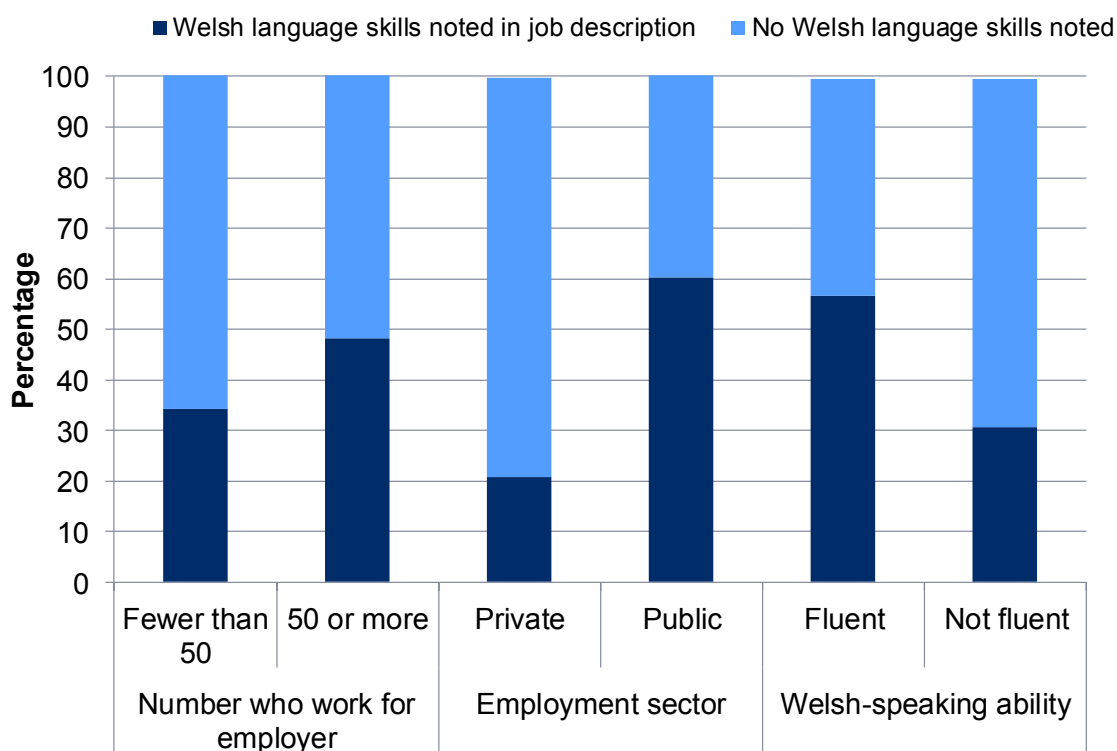
One of the last questions in the survey asked individuals whether Welsh language skills were noted in their job descriptions. 11 per cent of Welsh speakers who answered this question stated that they did not have a job description.

Of those who had a job description, almost one in five stated that Welsh language skills were specified as being essential in their job description. 26 per cent stated that Welsh language skills were specified as being desirable, and 56 per cent said that there were no Welsh language requirements in their job description.

Geographically, the percentage of people with job descriptions that specified a need for Welsh language skills (either essential or desirable) was at its highest in areas with the highest percentages of Welsh speakers, such as the Isle of Anglesey, Gwynedd and Ceredigion. However, substantial percentages of workers whose job descriptions specified the need for Welsh language skills also lived in places such as Cardiff, 52 per cent, Denbighshire, 52 per cent, and Pembrokeshire, 50 per cent.

There was little difference regarding the inclusion of Welsh in job descriptions between the different age groups, although public sector workers were over three times more likely to have Welsh language skills requirements in their job descriptions than private sector workers. There was a bigger difference in terms of workers whose job descriptions noted that Welsh language skills were essential: 6 per cent in the private sector compared to 26 per cent in the public sector.

Figure 46: Percentage of Welsh speakers’ job descriptions that have Welsh language skills noted, by size of organisation, employment sector and fluency



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18. Annex A: Key quality information

Background

The Welsh Language Use Survey 2013-15 is a continuation of research into the use of the Welsh language that was originally undertaken on behalf of the Welsh Language Board between 2004 and 2006. It was commissioned jointly by the Welsh Government and the Welsh Language Commissioner to be carried out as part of the National Survey for Wales.

National Survey for Wales

The National Survey for Wales was carried out by TNS-BMRB and Beaufort Research on behalf of the Welsh Government. The results reported here are based on the sample of addresses issued to interviewers between April 2013 and March 2015.

For the National Survey of Wales, just over 49,000 addresses were chosen randomly from the Royal Mail's Small User Postcode Address File. Interviewers visited each address, randomly selected one adult (aged 16 and over) in the household and carried out a 25-minute face-to-face interview with them. A total of 29,056 interviews were achieved, which equates to a response rate of 70 per cent in 2013-14 and 64 per cent in 2014-15.⁴

Respondents who participated in the National Survey for Wales were given a self-completion questionnaire for every Welsh speaker in the household. In the 2013-15 survey, 63,561 individual household members (aged three and over) were recorded, 16,967 Welsh speakers were identified and 7,175 Welsh speakers returned a completed questionnaire.

The table below shows the acceptance, return, and response rates for the adults and children and young people questionnaires.

⁴ Details of how the sample size is calculated are set out in the National Survey for Wales technical report. For example, the final response rate excludes addresses that were found to be unoccupied.

Overall 2013-15 acceptance, return, and response rates (excluding ineligible respondents)

| | Eligible | Accepted | Received | Acceptance rate | Return rate | Response rate |
|----------------------------------|----------|----------|----------|-----------------|-------------|---------------|
| Adults | 11,976 | 9,889 | 5,689 | 83% | 58% | 48% |
| Children and young people | 4,460 | 3,586 | 1,486 | 80% | 41% | 33% |
| TOTAL | 16,436 | 13,475 | 7,175 | 82% | 53% | 44% |

These are the definitions used:

Acceptance rate: the proportion of eligible individuals who accepted a questionnaire;

Return rate: the proportion of accepted questionnaires that were completed and returned;

Response rate: the proportion of eligible individuals who returned and completed a questionnaire (equal to the acceptance rate multiplied by the return rate).

Due to the way people were identified to take part in the survey, information on Welsh speakers within the household was provided by the respondent on behalf of other household members. As a result, it was possible for questionnaires to be issued to individuals who do not consider themselves to be Welsh speakers.

In order to account for this potential discrepancy, a question was included at the beginning of the questionnaire asking each Welsh Language Use Survey respondent whether they can speak Welsh. Anyone indicating that they did not speak Welsh was instructed to return the questionnaire without answering any further questions, to indicate that they are actually ineligible for the survey. 520 respondents indicated that they were not Welsh speakers and therefore did not take part in the survey. These have been removed from the table above.

For more information about how the Welsh Language Use Survey was administered, please see the [technical report](#) for the Welsh Language Use Survey.

For more information about the National Survey for Wales and how it was administered, please see the [National Survey webpages](#) or the [technical report](#) for the National Survey for Wales.

More information about the Welsh Language Use Surveys of 2004-06 and their results can be found in the report on the [Welsh Language Use Surveys of 2004-06](#).

Interpreting the results

Percentages quoted in this report are based only on those respondents who provided an answer to the relevant question. Missing answers are a common problem for self-completion questionnaires and can occur for several reasons, including refusal or inability to answer a particular question and cases where the question is not applicable to the respondent.

Where a relationship has been found between two factors, this does not mean it is a [causal relationship](#). More detailed analysis will be required to identify any causation.

The results of the Welsh Language Use Survey are weighted to compensate for unequal selection probabilities and differential non-response (i.e. to ensure that the age and sex distribution of the final dataset matches that of the Welsh speaking population identified in the National Survey for Wales).

Quality Report

A summary [Quality Report](#) is available, containing more detailed information on the quality of the survey as well as a summary of the methods used to compile the results.

Sampling variability

Estimates from the Welsh Language Use Survey are subject to a margin of uncertainty. Part of the uncertainty comes from the fact that any randomly-selected sample of the population will give slightly different results from the results that would be obtained if the whole population was surveyed. This is known as sampling error. Confidence intervals can be used as a guide to the size of the sampling error.

The results discussed in this report as well as other results of the survey are presented in a series of [StatsWales](#) tables along with their 95% confidence intervals. A confidence interval can be calculated around a survey estimate and gives a range within which the true value is likely to fall. In 95% of survey samples, the 95% confidence interval will contain the 'true' figure for the whole population (that is, the figure we would get if the survey covered the entire population). In general, the smaller the sample size the wider the confidence interval.

Confidence intervals can also be used to help tell whether there is a real difference between two groups. As a rough guide to interpretation, when comparing two groups, if the confidence intervals around the estimates overlap, it can be assumed that the estimates are

not statistically significantly different. This approach is not as rigorous as doing a formal statistical test, but is straightforward, widely used and reasonably robust. The 95% confidence intervals are shown in the StatsWales tables. These intervals have been adjusted to take into account the design of the survey and are larger than they would be if the survey had been based on a simple random sample.

To ensure that the survey estimates quoted in this report are robust, we have also calculated the coefficient of variation (CV) for each estimate. The CV is calculated as the standard error multiplied by 100 and divided by the average. Estimates with a CV of 20 or more are not considered reliable for practical purposes.

The results presented in the StatsWales tables have been colour coded according to the CV for each result as follows.

| | | |
|---|--|-------------------|
| | Estimate is precise | $0 \leq CV < 5$ |
| | Estimate is reasonably precise | $5 \leq CV < 10$ |
| | Estimate is considered acceptable | $10 \leq CV < 20$ |
| | Estimate is not reliable | $CV \geq 20$ |
| - | Value is suppressed due to small cell size (fewer than 30 responses) | |

As with any survey, the Welsh Language Use Survey is also subject to a range of other sources of error: for example, due to non-response; because respondents may not interpret the questions as intended or answer accurately; and because errors may be introduced as the survey data is processed. These kinds of error are known as nonsampling error, and are discussed further in the Quality Report for the survey.

Significant differences

Where the text of this report notes that there has been no significant difference, we have checked to ensure that the confidence intervals for the two results do not overlap. If the confidence intervals do not overlap, it suggests that the difference is statistically significant (but as noted above, is not as rigorous as carrying out a formal statistical test), i.e. that there is less than a 5 per cent (1 in 20) chance of obtaining these results if there is no difference between the same two groups in the wider population.

Checking to see whether two confidence intervals overlap is less likely than a formal statistical test to lead to conclusions that there are real differences between groups. That is, it is more likely to lead to "false negatives": incorrect conclusions that there is no real difference when in fact there is a difference. It is also less likely to lead to "false positives": incorrect conclusions that there is a difference when there is in fact none. Carrying out many comparisons increases the chance of finding false positives. Therefore, when many comparisons are made the conservative nature of the test is an advantage because it reduces (but does not eliminate) this chance.

Technical Report

More detailed information on the survey methodology is set out in the [Technical Report](#) for the survey.

Revisions

Information on our revisions policy is available [here](#).

Release policy

Information about the process for releasing new results is available from the Welsh Government's statistics [web pages](#).

Availability of datasets

The data behind the figures and tables in this release can be found in a series of topic-specific spreadsheets on [StatsWales](#).

An anonymised version of the dataset (from which some information is removed to ensure confidentiality is preserved), together with supporting documentation, will be deposited with the [UK Data Archive](#) after the publication of these results. For more information, please contact us (see contact details on inside cover).

Further uses of the results

The results of this survey will be used by Welsh Government's policy departments and by the Welsh Language Commissioner to help monitor the use of the Welsh language in Wales. The results are also relevant to all other organisations and individuals with an interest in gaining a better understanding of language use patterns across Wales. These include organisations and agencies responsible for delivering services to the public, the education sector, and a wide range of organisations involved in promoting use of the Welsh language.

The results will also be of interest to the Public Services' communicators' network CommsCymru, and to academics.

Feedback or further information

If you have any feedback you would like to provide about this report or would like any further information, please visit our [website](#) or contact us on 029 2082 6685 or 0845 6033221; or email welshlanguagedata@wales.gsi.gov.uk or post@welshlanguagecommissioner.org.

We welcome comments from users on our publications, for example on content and presentation.

Questionnaires

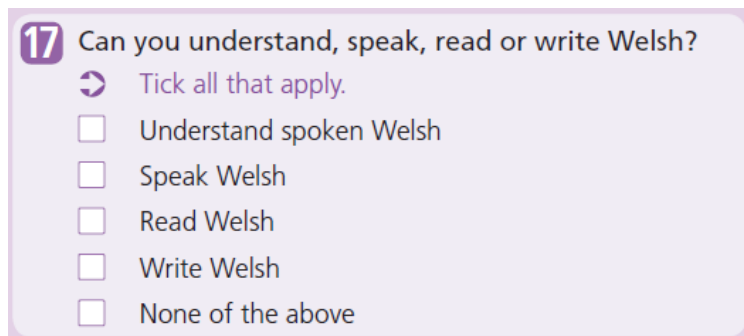
A copy of both the adult and children and young person questionnaire can be found in [Annex C](#).

19. Annex B: How many people in Wales speak Welsh?

The 2011 Census is the key source of information about the number of people who can speak Welsh. The Welsh Language Use Survey was not intended to provide new statistics on the number of people who say they can speak Welsh, but rather to provide a picture of how fluent Welsh speakers are, and how they use the language.

The Census has collected information about the population of England and Wales every 10 years since 1801. The latest census in England and Wales took place in March 2011.

Question 17 in the 2011 Census asked people living in Wales:



17 Can you understand, speak, read or write Welsh?

➔ Tick all that apply.

- Understand spoken Welsh
- Speak Welsh
- Read Welsh
- Write Welsh
- None of the above

The 2011 Census showed that 19.0 per cent of people three years old and over living in Wales said they could speak Welsh: ten years earlier the figure from the 2001 Census was 20.8 per cent. The 2001 figure showed an increase compared with the 1991 Census, halting a decline that had been seen throughout the twentieth century.

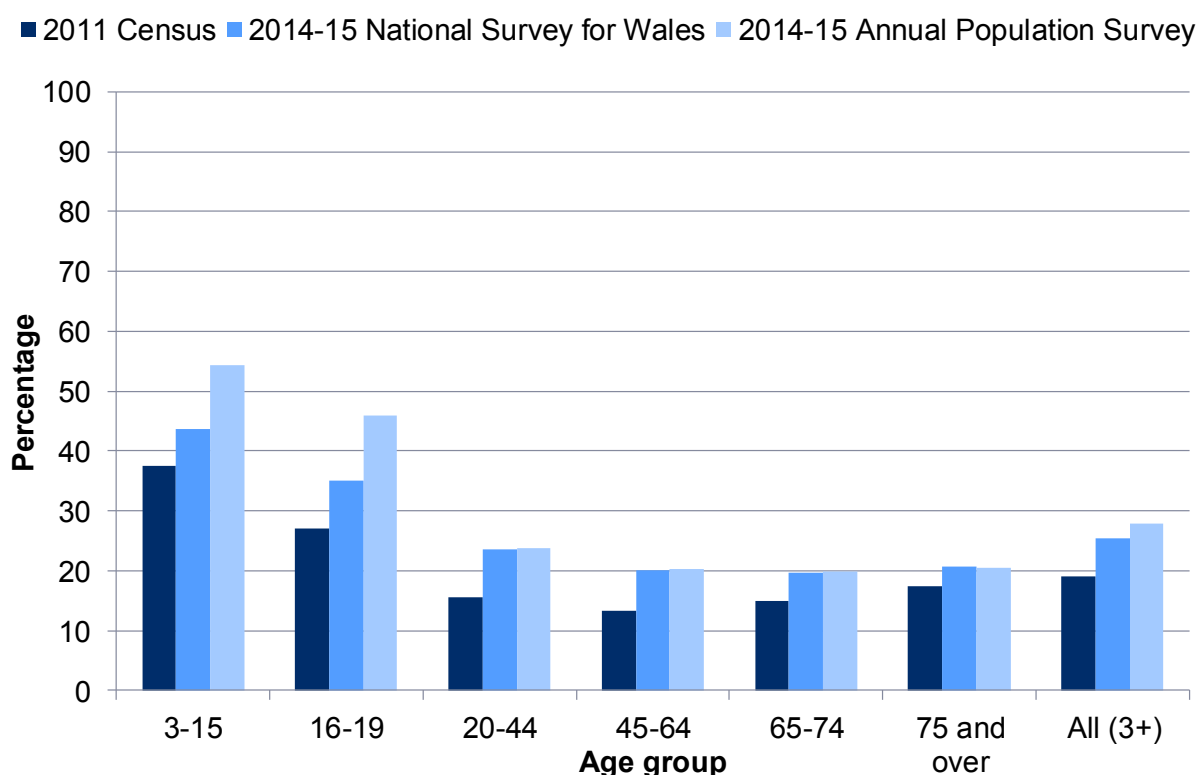
Information about respondents' Welsh language ability and frequency of use is also collected in the Annual Population Survey. The Annual Population Survey combines results from the Labour Force Survey funded by England, Wales, and Scotland.⁵ The Annual Population Survey asks respondents whether they can speak Welsh, and if they can, how often they speak it.

The question about Welsh language ability included in the Annual Population Survey, the National Survey for Wales and the Welsh Language Use Survey is identical to that included in the Census. Despite this, the proportion of people who state that they speak Welsh is higher for all of these surveys than it is for the Census.

⁵ The Labour Force Survey is a survey of the employment circumstances of the UK population; it also collects some basic demographic data. It is the largest regular survey of households in the UK and provides the official measures of employment and unemployment.

The 2013-15 Welsh Language Use Survey showed that 24 per cent (677,800) of all those aged three and over could speak Welsh. This compares with 19.0 per cent (562,000) in the 2011 Census, 28 per cent (824,100) in the Annual Population Survey and 25 per cent (751,000) in the National Survey for Wales. The figure below shows how the numbers vary by age according to each of these alternative sources.

Figure 47: Percentage of people who speak Welsh by age and source



Differences in how these surveys and the Census are carried out are likely to have affected the results. The Census used a self-completion questionnaire for all people; the National Survey used face-to-face interviews of one adult aged 16 and over. The Annual Population Survey uses some face-to-face interviews and some telephone interviews of adults aged 16 and over. In interviewer-led surveys, respondents may feel more likely to report that they speak Welsh.

It should also be borne in mind that speakers' assessment of how well they speak a language can be quite subjective. For some people, the ability to say a few words in the language is enough for them to say that they speak it. Others, despite speaking it regularly, may say that they can't speak it if they feel that they are more comfortable speaking another

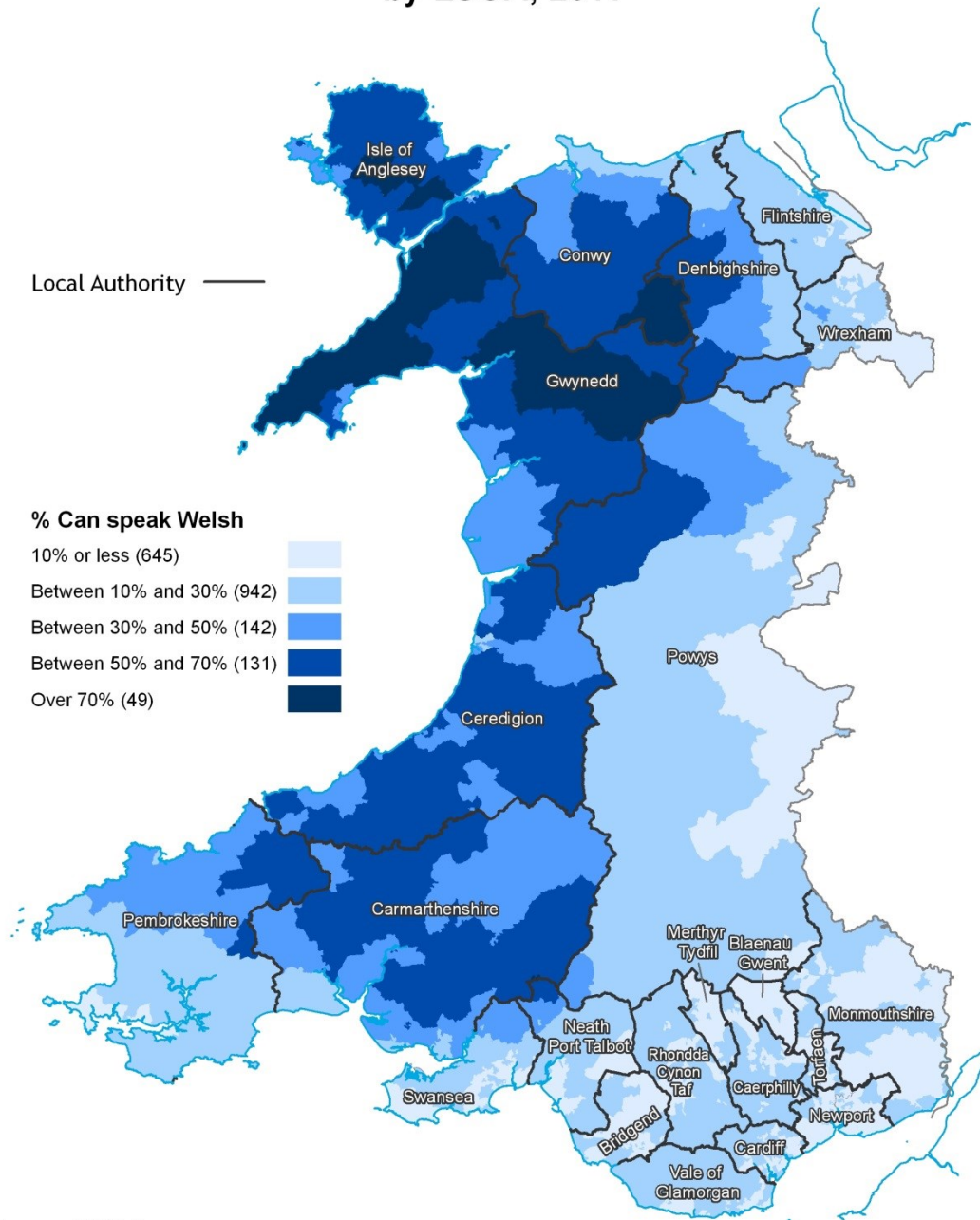
language. When respondents are faced with only one question, in an official statutory survey, they must make a categorical decision about whether they speak Welsh or not. Where an interviewer is present, the respondent may feel more able to describe their ability levels in more detail with the interviewer and the interviewer may encourage respondents to say that they are able to speak Welsh, so that they can provide more details about their ability in the subsequent questions. Indeed for the National Survey for Wales, interviewers were briefed to code people who hesitated over their answer to the question (owing to the fact that they did have some Welsh-speaking ability) as Welsh-speaking (around 4 per cent), because there was a subsequent question on level of ability.

For these reasons, some respondents recorded as speaking Welsh in the National Survey for Wales or the Annual Population Survey might have reported that they were not Welsh-speaking when completing the Census questionnaire.

One advantage of the Census is that the data is reliable for small areas. The following map shows the distribution of numbers of people who said they could speak Welsh at the Lower Layer Super Output Area in Wales. There are nearly 2,000 Lower Layer Super Output Areas in Wales, each with a population of around 1,500. The map shows that reported ability in Welsh was higher than average in most parts of North and West Wales (apart from Flintshire, Wrexham, and parts of Pembrokeshire), and highest in parts of Gwynedd and parts of the Isle of Anglesey where over 70 per cent of people say they can speak Welsh. Ability in the language was lowest in places on the border with England and in some parts of South Wales (particularly Monmouthshire, Newport, and Blaenau Gwent).

Figure 48: Proportion of people aged three and over able to speak Welsh by Lower Layer Super Output Area (LSOA), 2011

Proportion of people (aged 3 and over) able to speak Welsh, by LSOA, 2011



Source: 2011 Census

193.12-13

Geography & Technology

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As stated above, the 2013-15 Welsh Language Use Survey and the National Survey for Wales itself gave different estimates for the percentage of Welsh speakers (24 per cent and 25 per cent respectively).

The reason for the discrepancy between these two surveys is that in the National Survey the respondent stated who they believed could speak Welsh in their household. The first question in the self-completion questionnaire for the Welsh Language Use Survey repeats the question that was asked in the National Survey for Wales by asking for respondents' ability in understanding spoken Welsh, speaking Welsh, reading Welsh and writing Welsh.

Answers to these questions revealed that not everyone agreed with the original respondent's opinion about the Welsh language ability of other members of the household. Although initially identified as Welsh speakers, some respondents subsequently stated that they could not speak Welsh. Consequently the first estimate provided by the National Survey for Wales decreased for the Welsh Language Use Survey.

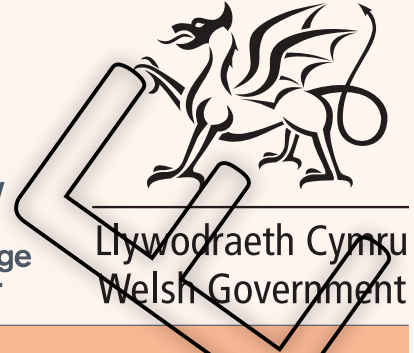
20. Annex C: Questionnaires



TNS BMRB



Comisiynydd y
Gymraeg
Welsh Language
Commissioner



Llywodraeth Cymru
Welsh Government



National Survey for Wales - Welsh Language Use Survey 2014-15

QUESTIONNAIRE FOR ADULTS AGED 16+

Interviewer to write in:

SERIAL NUMBER PERSON NUMBER

QUESTIONNAIRE TO BE COMPLETED BY

This questionnaire is about the Welsh Language. We are interested in finding out whether you can speak Welsh, and the type of situations in which you use Welsh. All of your answers will be treated in confidence. Your answers will be anonymised so that no one can know the information relates to you, before being passed to the Welsh Government and the Welsh Language Commissioner who will use the information you give.

If you have any questions or concerns about this survey, please contact the National Survey team on 029 2082 6685 or surveys@wales.gsi.gov.uk

I very much hope you will be able to take part. Please return this questionnaire in the pre-paid envelope provided or to the address shown at the end of the questionnaire.

Thank you very much for your help in advance.

Yours faithfully,

Steven Marshall
Chief Social Research Officer of the Welsh Government

HELPFUL HINTS FOR COMPLETING THIS QUESTIONNAIRE

- The questionnaire should be completed by the person whose name appears above.
- Please read each question and cross a box to indicate your answer.
- In most cases you will only have to cross one box, but please read the questions carefully as sometimes you will need to cross more than one box.
- If you make a mistake or change your mind, completely block out the box you have crossed [■] and then put a cross in your preferred answer box.
- You will need to use **black ink ONLY**.
- Answer each question in order unless asked otherwise.
- Once you have finished, please take a minute to check you have answered all the questions that you should have answered.
- The survey consists of 5 pages and should take you no longer than 10 minutes to complete.

SECTION 1: Welsh language skills and usage

Q1. Can you understand, speak, read or write Welsh?

Please cross as many boxes as apply

- Understand spoken Welsh
- Speak Welsh
- Read Welsh
- Write Welsh
- None of above

If you have **NOT** selected 'Speak Welsh' at Q1, there are no further questions to answer. Thank you for taking part. Please return the questionnaire in the envelope provided.

If you **HAVE** selected 'Speak Welsh' at Q1, please proceed to Q2.

Q2. Which of the following best describes your ability to speak Welsh?

Please cross one box only

- I'm fluent in Welsh
- I can speak a fair amount of Welsh
- I can only speak a little Welsh
- I can just say a few words

Q3. Where did you mainly learn to speak Welsh?

Please cross one box only

- At home, as a young child
- At nursery (aged 3-4)
- At primary school (aged 5-10)
- At secondary school (aged 11+)
- At college or university (full-time)
- Somewhere else, including on a 'Welsh for adults' course

Please give details below

Q4. How well could your parents speak Welsh when you were a child?

Please cross one box in each row

| | Fluent | Fairly Fluent | Some Welsh | No Welsh | Don't know | Not applicable |
|--------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Father | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Mother | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q5. What language do you mainly speak in the following situations...

Please cross one box in each row

| | Always/ almost always Welsh | Mainly Welsh | Roughly equal use of Welsh and English | Mainly English | Always/ almost always English | Other | Not applicable |
|---|-----------------------------|--------------------------|--|--------------------------|-------------------------------|--------------------------|--------------------------|
| At home? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| At school, college or university? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| With friends? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| With your nearest neighbour? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| For day to day activities such as shopping or taking the bus? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q6. Thinking about the most recent conversation you had with someone who is not in your family, what language did you speak?

Please cross one box only

- Welsh
- English
- Other *Please give details below*

Q7. How often do you speak Welsh?

Please cross one box only

- Daily
- Weekly
- Less often
- Never

Q8. How well can you write in Welsh?

Please cross one box only

- Very well
- Well
- Not well
- Not at all

Q9. What language do you usually use to do each of the following...

Please cross one box in each row

| | Always/ almost always Welsh | Mainly Welsh | Roughly equal use of Welsh and English | Mainly English | Always/ almost always English | Other | Not applicable |
|--|-----------------------------|--------------------------|--|--------------------------|-------------------------------|--------------------------|--------------------------|
| Send a text message from a mobile phone to a friend? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Send an email to a friend? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Write on Facebook? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Write on Twitter? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q10. What was the language of your education at each of the following stages...

Please cross one box in each row

| | Only Welsh | Mainly Welsh | Roughly equal use of Welsh and English | Mainly English | Only English | Other | Not applicable |
|----------------------|--------------------------|--------------------------|--|--------------------------|--------------------------|--------------------------|--------------------------|
| At Nursery school? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| At Primary school? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| At Secondary school? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q11. Do you try to use Welsh... (e.g. by looking out for, selecting, or asking for a Welsh option)

Please cross one box in each row

| | Yes, always | Yes, usually | Yes, sometimes | No | Not applicable |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| When dealing with public organisations (e.g. your local council)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| To complete official forms? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

If you selected 'No' or 'Not applicable' for both options at the previous question, please go straight to Q13.

Q12. How often do you succeed in using Welsh... (e.g. by managing to speak to someone in Welsh, or obtaining materials in Welsh)

Please cross one box in each row

| | Always/ almost always | Usually | Sometimes | Never | Not applicable/ never tried |
|---|--------------------------|--------------------------|--------------------------|--------------------------|-----------------------------|
| When dealing with public organisations (e.g. your local council)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| To complete official forms? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q13. In the last year, have you attended an organised...

Please cross one box in each row

| | Yes | No | Don't know/ Not applicable |
|---|--------------------------|--------------------------|----------------------------|
| social or cultural event or activity held in Welsh (e.g. concert, eisteddfod, gig, choir, or society)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| sporting event or activity held in Welsh (e.g. sports club, society or course)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q14. Which language do you feel most comfortable using?

Please cross one box only

- Welsh
- English
- Equally comfortable in both
- Other

If you are aged **over 16 AND in employment** please complete the next section. Otherwise, thank you for completing the questionnaire. Please now return it in the envelope provided.

SECTION 2: Welsh language at work

Q15. How many people work for your employer at the place where you work?

Please cross one box only - If you are unsure, please give an estimate.

| 1 - 10 | 11 - 49 | 50 - 249 | 250+ | Don't know |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q16. How many people work for your employer in total, including other branches and locations?

Please cross one box only - If you are unsure, please give an estimate.

| 1 - 10 | 11 - 49 | 50 - 249 | 250+ | Don't know | No other locations/ branches |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q17. In which sector do you work?

Please cross one box only

| Private | Voluntary/ third sector | Public | Don't know |
|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q18. At work, do you...

Please cross one box in each row

| | Yes, always | Yes, usually | Yes, sometimes | No | Not applicable |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Speak Welsh with colleagues? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Speak Welsh with people outside your company/ organisation? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Write anything in Welsh? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q19. Has your employer offered you anything to wear to indicate that you can speak Welsh (e.g. a 'Welsh' badge)?

Please cross one box only

- Yes
- No
- Don't know

Q20. Are Welsh language skills noted in your job description?

Please cross one box only

- I don't have a job description
- Yes – as 'essential'
- Yes – as 'desirable'
- No
- Don't know

Q21. Which of these statements best describes your employer?

Please cross one box only - Remember, Your answers will be treated in the strictest confidence.

- Supportive of the use of Welsh in formal and informal aspects of the business
- Supportive of the use of Welsh informally but not in formal business matters
- Not supportive of the use of Welsh
- None of these
- Don't know

Thank you for completing the questionnaire.

Please now return it in the envelope provided.

If you have misplaced or did not receive an envelope, please return the questionnaire to

Freepost RRZG-NCJK-LTSE
TNS
Olympus Avenue
Tachbrook Park
Warwick
CV34 6RJ



TNS BMRB



Comisiynydd y
Gymraeg
Welsh Language
Commissioner



Llywodraeth Cymru
Welsh Government



National Survey for Wales - Welsh Language Use Survey 2014-15

YOUNG PERSON'S QUESTIONNAIRE (3 TO 15 YEARS OLD)

Interviewer to write in:

SERIAL NUMBER

PERSON NUMBER

QUESTIONNAIRE TO BE COMPLETED BY PARENT/GUARDIAN ABOUT _____

This questionnaire is about the Welsh Language. We are interested in finding out more about the type of situations in which people use Welsh. All of your answers will be treated in confidence. Your answers will be anonymised so that no one can know who the information relates to you, before being passed to the Welsh Government and the Welsh Language Commissioner who will use the information you give.

If you have any questions or concerns about this survey, please contact the National Survey team on 029 2082 6685 or surveys@wales.gsi.gov.uk

I very much hope you will be able to take part. Please return this questionnaire in the pre-paid envelope provided or to the address shown at the end of the questionnaire.

Thank you very much for your help in advance.

Yours faithfully,

Steven Marshall
Chief Social Research Officer of the Welsh Government

HELPFUL HINTS FOR COMPLETING THIS QUESTIONNAIRE

- This questionnaire should be completed by the parent/guardian of the child whose name appears above, or if the child is over 12, by the named child themselves, if the parent/guardian and child prefer - the parent will need to sign the consent at the end of the questionnaire.
- Please read each question and cross a box to indicate your answer.
- In most cases you will only have to cross one box, but please read the questions carefully as sometimes you will need to cross more than one box.
- If you make a mistake or change your mind, completely block out the box you have crossed and then put a cross in your preferred answer box.
- You will need to use **black ink ONLY**.
- Answer each question in order unless asked otherwise.
- Once you have finished, please take a minute to check you have answered all the questions that you should have answered.
- The survey consists of 3 pages and should take you no longer than 5 minutes to complete.

Q1. Can your child understand, speak, read or write Welsh?

Please cross as many boxes as apply

| | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Understand spoken Welsh | Speak Welsh | Read Welsh | Write Welsh | None of these |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

If you have **NOT** selected 'Speak Welsh' at Q1, there are no further questions to answer. Thank you for taking part. Please return the questionnaire in the envelope provided.
 If you **HAVE** selected 'Speak Welsh' at Q1, please proceed to Q2.

Q2. Which of the following best describes your child's ability to speak Welsh?

Please cross one box only

| | | | |
|--------------------------|----------------------------------|-------------------------------|--------------------------|
| Fluent in Welsh | Can speak a fair amount of Welsh | Can only speak a little Welsh | Can say just a few words |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q3. Where did your child mainly learn to speak Welsh?

Please cross one box only

- At home, as a young child
- At nursery (aged 3-4)
- At primary school (aged 5-10)
- At secondary school (aged 11+)
- Somewhere else *Please give details below*

Q4. How well can each of the following family members speak Welsh?

Please cross one box in each row

| | Fluent | Fairly Fluent | Some Welsh | No Welsh | Don't know | N/A |
|------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Child's father | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Child's mother | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Child's brother(s)/sister(s) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q5. What language does your child mainly speak in the following situations...

Please cross one box in each row

| | Always/ almost always Welsh | Mainly Welsh | Roughly equal use of Welsh and English | Mainly English | Always/ almost always English | Other | N/A |
|---------------|-----------------------------|--------------------------|--|--------------------------|-------------------------------|--------------------------|--------------------------|
| At home? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| At school? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Talking to... | | | | | | | |
| Father? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Mother? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Grandparents? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Friends? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q6. How often does your child speak Welsh?

Please cross one box only

| | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|
| Daily | Weekly | Less often | Never |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q7. What language does your child usually use to do each of the following...

Please cross one box in each row

| | Always/ almost always Welsh | Mainly Welsh | Roughly equal use of Welsh and English | Mainly English | Always/ almost always English | Other | N/A |
|---|-----------------------------------|--------------------------|--|--------------------------|-------------------------------------|--------------------------|--------------------------|
| To send a text message from a mobile phone to a friend? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| To send an email to a friend? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| On social networking sites (e.g. Bebo, Facebook)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Please answer Q8 if your child is at secondary school – otherwise, please go to Q9

Q8. In which language is your child taught the following subjects at secondary school?

Please cross one box in each row

| | Always/ almost always Welsh | Mainly Welsh | Roughly equal use of Welsh and English | Mainly English | Always/ almost always English | Other | N/A |
|--|--------------------------------|--------------------------|--|--------------------------|----------------------------------|--------------------------|--------------------------|
| Mathematics | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Science | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Geography | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Art and Design | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Design and Technology | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Information and Communication Technology | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Welsh | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| History | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Physical Education | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Modern Languages | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Music | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Drama | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q9. In the last year, has your child attended an event or activity held in Welsh, and not organised by their school (e.g. organised by a community sports club, Menter Iaith, the Urdd etc.)...

Please cross one box in each row

| | Yes | No | Don't know/ Not applicable |
|---|--------------------------|--------------------------|----------------------------|
| social or cultural event or activity held in Welsh (e.g. concert, eisteddfod, gig, choir, or society)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| sporting event or activity held in Welsh (e.g. sports club, society or course)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q10. In the last year, has your child attended an event or activity held in Welsh, organised by their school outside of school hours...

Please cross one box in each row

| | Yes | No | Don't know/ Not applicable |
|---|--------------------------|--------------------------|----------------------------|
| social or cultural event or activity held in Welsh (e.g. concert, eisteddfod, gig, choir, or society)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| sporting event or activity held in Welsh (e.g. sports club, society or course)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q11. Who completed this questionnaire?

Please cross one box only

Child

Parent/ Guardian

Parent to sign here if child completing questionnaire _____

Thank you for completing the questionnaire.

Please now return it in the envelope provided.

If you have misplaced or did not receive an envelope, please return the questionnaire to

Freepost RRZG-HCJX-ITSE
TNS
Olympus Avenue
Tachbrook Park
Warwick
CV34 6RJ