

gwŷr meirch *ell* cavalry  
gwŷr traed *ell* infantry  
gwŷr yr ecseis *ell* revenue men  
gwyrdröedig *ans* deviant  
gwyrdroi *be* subvert  
gwyrdd alisarin *eg* alizarin green  
gwyrdd bwdgerigar *eg* budgerig  
gwyrdd cobalt *eg* cobalt green  
gwyrdd crôm *eg* chrome green  
gwyrdd efydd *eg* bronze green  
gwyrdd llachar *eg* brilliant green  
gwyrdd olewydd *eg* olive green  
gwyrdd porfa *eg* grass green  
gwyrdd sudd *eg* sap green

## Use of the Welsh Language in the Private Sector: Case Studies



Y Ganolfan Rheolaeth  
YSGO, BUSINESS BANGOR BANGOR BUSINESS SCHOOL,  
The Management Centre



PRIFYSGOL  
BANGOR  
UNIVERSITY

# **Use of the Welsh Language in the Private Sector: Case Studies**

**Contract number 190/2007/08**

**A report prepared for**

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Economic Research Unit**

**by**

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**ISBN 978 0 7504 6524 3**

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## 1. Executive summary

Between September 2008 and March 2010 the Centre for Business Research and Market Intelligence (CBRmi) at Bangor Business School carried out research into the use of the Welsh language within a range of private sector businesses and organisations throughout Wales, on behalf of the Welsh Assembly Government (WAG). Private sector firms adopt a variety of approaches to the language when dealing with the public, choosing very different strategies depending on a number of factors, such as geographical location, type of customer, skills of the workforce and commitment of the management to this aspect. This study has sought to explore the driving forces behind the decision to make use of the language or otherwise.

The study builds on previous work by the Welsh Language Board in comparing businesses operating in a range of sectors, businesses of different sizes, different geographical locations, and customer bases. The study sought to recruit businesses that were strongly disposed towards bilingual operation, those that were neutral and those that were negatively disposed. By comparing firms performing similar activities, but making differing use of the language, the report attempts to improve understanding of the factors that influence the extent to which private sector businesses use the Welsh language.

The study took the form of an electronic survey of 258 Welsh businesses of differing sizes, sectors and customer bases, selected from a variety of databases made available to the research team. Businesses were recruited both directly from existing databases of around 1400 businesses and/or via business-facing bodies such as the Federation of Small Businesses (FSB) etc., to respond to an initial questionnaire concerning their business and the role of the Welsh language within it. The quantitative findings are presented in the document. From these 258 businesses, a subset of 60 businesses was identified for closer study, either via a more detailed questionnaire or in-depth interview/visit. An attempt was made to have representative samples of businesses that were positive, ambivalent or negative towards the language. The qualitative findings are presented as a series of vignettes, according to that grouping.

Because the study brief placed greater emphasis on the qualitative aspects, consideration of statistical representation by geographic location and other factors was secondary to identifying

companies for further study who had positive, neutral or negative views towards Welsh language as a business driver; it should be noted, however, that a clear numerical bias in favour of north Wales based businesses taking part emerged, and very low numbers were recruited from mid Wales. Any quantitative conclusions drawn must therefore have the caveat applied that the low numbers will introduce a high degree of uncertainty when applying any messages derived from the numerical data.

There were a number of challenges facing the team during the course of the investigation which are highlighted here. The survey was conducted during a recession, when the concerns of business owners and managers were often focussed elsewhere. Other studies by national bodies that incorporated elements pertaining to Welsh language were in operation at a similar time when the initial survey was being undertaken. There were also some issues regarding distribution of the survey through industry bodies. However, these matters were overcome satisfactorily, and the number of respondents was as anticipated. Other limitations with the survey were that it was **self-reporting**: aspects such as numbers of Welsh speaking customers were often poorly understood, and the degree of use of Welsh within the business was based on the respondent's **subjective perception**.

Below is a summary of key findings from the general electronic survey of 258 businesses, followed by a highlight of the 60 case studies, where the positive, neutral and negative categories are considered in turn for headline messages.

Key findings from the questionnaire (**Appendix A**) for the 258 businesses or organisations were as follows (see **Section 4** for more detailed description of the category definitions used):

<b><u>Regional distribution of all surveyed businesses<sup>1</sup></u></b>	
North	63%
South	19%
Mid	6%
All Wales <sup>2</sup>	5%

<sup>1</sup> Where total does not equal 100%, the remainder are unknown or unspecified, here and elsewhere.

<sup>2</sup> All Wales: businesses with multiple locations in the different regions of Wales.

The initial fieldwork yielded a greater proportion of responses from businesses based or serving the north. A number of factors may have contributed: the available data sources provided good coverage of north Wales, compared with mid and south Wales. In addition, the greater number of Welsh-speaking individuals located there may have resulted in the survey having greater resonance for their business. Thus the sample is not ideally representative of the total Welsh business population.

<u>Attitude to Welsh usage</u>	
Positive	22%
Neutral	46%
Negative	26%

Just over one fifth of respondents reported a positive attitude towards the use of the Welsh language. Further, almost half of the respondents (46%) are open-minded (neutral) in terms of using Welsh. **Therefore in language planning terms there appears to be some scope for targeting the use of Welsh amongst such neutral businesses in Wales.**

<u>Percentage of Welsh-speaking staff</u>	
Welsh-speaking staff	Businesses
0%	26%
1-20%	17%
21-40%	9%
41-60%	7%
61-80%	5%
81-100	21%
[Don't know	15%]

At the extremes, 26% of businesses had no Welsh-speaking staff and 21% had 81%-100% Welsh-speaking staff; however, a **key finding** from this question was that the remaining 59% of all businesses had between 1 - 100% bilingual staff at their disposal (15% did not know). Despite these

levels of bilingual skills available in the workforce, the previous finding shows that only 22% of businesses take a positive approach concerning the Welsh language with customers.

<u>Percentage of organisations having policies</u>	
Equal opportunities	65%
Complaints	57%
Environmental	57%
Customer care	50%
<b>Welsh Language</b>	<b>40%</b>
Diversity	32%

40% of respondents confirmed they had a written Welsh language policy; however, with the exception of a **diversity policy**, all other policies had greater levels of adoption. Sole traders and Small to Medium Enterprises (SMEs) may not see the requirement to have such a policy unless they tender regularly for public sector work. Of course it is possible to have a written Welsh language policy in place without a real commitment and/or provision. On a positive note, of the 60% of respondents who had some levels of bilingual skills, two thirds had adopted Welsh language policies in the workplace.

<u>Percentage of staff using Welsh with customers</u>	
Staff using Welsh	Businesses
0%	41%
1-20%	25%
21-40%	5%
41-60%	5%
61-80%	5%
81-100%	11%

41% of businesses had no employees that actively engaged with customers in Welsh. Whether this was through a lack of provision or a lack of demand was not the purpose of the question. Only 11%

of the businesses had 81-100% of employees actively engaging with customers in Welsh. Some respondents may be unaware of their employees’ linguistic skills or there may be a reluctance or inability to respond to customer demand.

<b><u>Percentage of bilingual customers</u></b>	
Bilingual customers	Businesses
0%	14%
1-20%	43%
21-40%	13%
41-60%	9%
61-80%	8%
81-100%	3%

This question is the reverse of the above, focussing instead on the Welsh language ability of customers. 14% of the businesses deal entirely with customers who (they believe) are unable to speak Welsh. Only 3% of the businesses that provided a response deal with customers who are mostly bilingual (81%-100%).

Comparing this and the previous question, a deeper analysis identifies the two extreme scenarios in respect to the demand and supply relationship – namely, those situations where a language need from customers is not being met, and those where an existing provision in employees is not being utilised with customers. This is represented graphically in Figure 14 on page 35.

This is an area for policy consideration – how to match supply and demand, or increase market share through availability of bilingual skills. The difference between perceived and actual bilingual ability regarding both staff and customers is an additional area for investigation.

**Degree of Welsh language provision by % of respondents**

Complete Welsh language customer service	12%
Visible, spoken and written	20%
Interpersonal/spoken only	10%
Visible only <sup>3</sup>	8%
Only respond to requests for service in Welsh	11%
No Welsh language provision at all	23%

The descriptions above were used to categorise the degree of Welsh usage by the business. Only 12% of respondents had a complete Welsh language customer service compared to 23% who had no Welsh language provision at all. 61% of businesses claimed they could provide some Welsh provision which should be compared with the earlier finding where 51% had some degree of Welsh speaking skills at their disposal. This finding may shed further light on the actual linguistic provision delivered by those respondents who classified themselves subjectively as being neutral towards use of Welsh. It is possible that they could be considered as positive in an objective comparison with other businesses.

**For those with some Welsh provision – reasons for the situation (Top 5)**

Geographical Location	64%
Identify with Wales	59%
Demand from customers	57%
Appropriate image	47%
Economic advantage	38%

It is worth highlighting that 38% felt they gained an economic advantage, whilst only 10% believed it to be *cost-effective* to provide a service in Welsh.

<sup>3</sup> Visible only: promotional literature, website and signage are bilingual.

#### For those with no Welsh provision at all – reasons for the situation (Top 4)

Lack of customer demand	75%
Welsh language not a skill we possess	38%
No economic advantage	37%
Additional burden on limited time resource	28%

In addition to these data, 28% stated that they had a **shortage of confident bilingual staff** whilst 25% cited geographical location as a reason.

#### Degree of Welsh provision by percentage of bilingual customers

With the caveat that both measures are subject to the perception of the respondents, the degree of Welsh language provision with number of Welsh speaking customers – supply and demand – were compared. Findings can be summarised as follows:

- **0%-20% bilingual customers.** Almost 40% of businesses with low a bilingual customer base provide no Welsh language provision at all with just 4% providing a complete Welsh language customer service. Language provision is heavily predicated upon demand.
- **21%-40% bilingual customers.** Over 40% provide visible, spoken and written service in Welsh. The percentage of businesses that provide no Welsh provision has dropped markedly. **This suggests that only a modest increase in demand for Welsh has a significant impact on level of provision.**
- **41% - 60% bilingual customers.** Not unexpectedly, over 80% of all the businesses provide either a visible, spoken and written service or a complete service in Welsh.
- **61% - 80% bilingual customers.** A similar pattern to the above is evident but surprisingly almost 15% of businesses still only respond reactively to requests for services in Welsh.
- **81% - 100% bilingual customers.** All businesses provide some services in Welsh although less than 40% provide full coverage.

Thus the provision of services in Welsh even amongst businesses which have a larger or full complement of bilingual customers is varied and inconsistent.

<u>Degree of Welsh provision by sector</u>		
Complete Welsh service	Public services	40%
	Not-for-Profit	38%
Only respond to requests for service in Welsh	Media	40%
	Public Services	40%
No Welsh language provision at all	Other	39%
	Retail of Services	32%

The above data show the two sectors that scored highest for providing a complete Welsh service, the two sectors that were predominantly reactive and the two sectors that provided no Welsh language service at all. Some of the data tended to polarise – for example, in the Financial, Legal and Other professional services category, 31% offered no Welsh service while 23% had a visible, spoken and written service, with an additional 23% offering a full Welsh service. Likewise, as can be partly deduced from the above, some sectors (Public Services, Media and the Not-for-Profit) were strongly polarised between only offering a reactive service to requests made in Welsh, and offering a full Welsh language service.

<u>Degree of Welsh provision by size of business</u>		
No Welsh language provision at all	Large business	44%
	SMEs	25%
	Micro business	26%
Visible, spoken and written service in Welsh	Large business	33%

The degree of Welsh provision is similar between micro businesses and SMEs but the main finding is that **not one large business provides a complete Welsh language customer service** although a third of businesses provide a visible, spoken and written service; however, large businesses are twice more likely to have a Welsh language policy than micro businesses.

Key findings from the in-depth questionnaire (**Appendix B**) resulting in 60 case studies are presented below. Businesses were categorised into those who were positive towards the use of Welsh, neutral and negative.

Key findings were as follows:

- In general, there was evidence that businesses had not formally assessed how much of their business was held in Welsh, thus they relied on estimates only.
- Amongst the **positive** group, strong political, ideological themes emerged.
- Words such as ‘image’ and ‘customer loyalty/care’ also occurred frequently.
- The role of legislation and servicing the public sector/government occurred repeatedly as drivers towards adoption of bilingual business strategies. Tendering for public sector work was a related driver.
- Economic advantages linked to the demand for bilingual content were highlighted, with the public sector again being seen as a driver, but problems recruiting suitably bilingual staff were also cited as a barrier.
- The need to match the business’s provision with other competitors in the same sector was cited; this related particularly to leisure and tourism.
- There were gaps in the market, especially in the legal sector where there was unmet demand for Welsh language contracts.
- In the **neutral** group, **evidence of demand** was cited repeatedly as a factor that would spur businesses on to a greater use of Welsh.
- Engendering a greater sense of customer loyalty was cited as a factor that might encourage greater use of the Welsh language in this group.
- Lack of suitably skilled bilingual individuals was cited as a reason for adopting a neutral stance.
- In the **negative** group, once again, **evidence of demand** (or lack thereof) and the **lack of demonstrable economic benefit** were cited as key factors as to why businesses were not likely to increase their use of Welsh.
- Strong views were expressed by some regarding future legislation and red tape, and the negative impact this could have on business. One company even indicated it would rather close down than be forced to implement Welsh language policies.

- There is a general lack of awareness of the practical support available and one business cited the availability of this as something that would spur them on to provide a more comprehensive Welsh language service.

**Amongst the Key Recommendations are the following:**

1. Work with the Standards Agencies and Quality Centres to define a baseline bilingual provision standards (rather than schemes).
2. Undertake more commercial assessments of the economic and social benefits of bilingual provision.
3. Raise awareness of and mainstream bilingual matters, their benefits and the support available among Business Relationship Managers as part of Welsh Assembly Government Department of Enterprise and Transport's (WAG DET) Flexible Support for Business (FS4B) programme.
4. Target support to areas where there is a higher proportion of Welsh speakers and to those businesses servicing local markets.
5. Target Sector Skills Councils (SSCs) and careers advice organisations to highlight the increasing need for and value of bilingual skills in the workplace.
6. Apply the positive lessons learned in the tourism sector ('sense of place', 'A Warm Welsh Welcome') to other sectors (for example, the care sector) through adopting and adapting successful strategies.
7. Provide a toolkit that will assist businesses to assess the linguistic needs of their customer base.

In conclusion, the market is the driver for implementation of Welsh language in the private sector. Where the perception is that there is no market requiring bilingual service provision, then empirical evidence is required to confirm or deny that supposition. Where a market is known to exist, it further requires quantification – how does it compare in size with the non-Welsh speaking customer base?

Welsh language usage should not be viewed just through the historical lens of the 'Welsh speaking heartlands': today there is a Welsh-speaking 'Diaspora' which has taken up employment in the

larger conurbations, in particular, Newport, Cardiff and Swansea. The Increasing spread of bilingual education will ensure that the customer demographic of the future will not necessarily share the same tight geographical boundaries as in the past.

Outsourcing of traditional public sector services to the private sector (e.g. social care) will see a necessity for those businesses to operate bilingually, or at least to recognise this requirement through adoption of formal policies. Similarly, those delivering services to public sector staff and service users, including training and education, health awareness, IT solutions, and so on will become increasingly aware of the need for bilingual provision. The shortage of legal firms able to provide a bilingual drafting service identified within the 60 case studies suggests that gaps in the market do exist in key sectors.

Finally, post-devolution, it worth noting that some UK-wide businesses or chains seem eager to brand, affiliate or identify themselves with their Welsh customers, and adoption of the Welsh language within their branding and literature is seen as one effective way of achieving this goal.

## 2. Background

The objective of this study commissioned by the Welsh Assembly Government's Economic Research Unit was to explore the factors that determine why private sector firms operating in Wales choose to make use, or not make use, of the Welsh language in their dealings with the public. This included adopting a case study approach, selecting firms that operate within similar business sectors and appear broadly comparable in terms of observable factors such as their size, location and customer base, but which have differing policies towards the use of the Welsh language. By comparing firms that appear to be performing similar activities in similar places for similar customers, but which nonetheless make differing use of Welsh, the study will improve understanding of the factors that influence the extent to which private sector businesses make use of the language. The study captured a spread of firm sizes and locations, covering geographical areas with both high and low proportions of Welsh speakers. CBRmi obtained information by inviting private sector firms to complete an online questionnaire and from responses gained held face-to-face interviews with relevant personnel from a small sample of firms. This study also drew on published statistics and the limited literature which exists on this topic. These are described and listed in the bibliography on page 65.

### Previously conducted related surveys

The examples below are of related surveys conducted in Wales. The scarcity of similar international research prohibits greater understanding, sharing findings, recommendations and best practices.

#### **1. Future Skills Wales Partnership survey by Beaufort Research and Menter a Busnes (2005).**

##### **Points of note, main findings and recommendations included:**

- a survey of almost 2,000 businesses in Wales focusing on those industry sectors found to have “an average or higher need for Welsh language skills.”
- Low level of need (9%) for Welsh language skills amongst employees, with the Media industry having the greatest need (18%);

- Geographical location “has a great influence on the level of demand for Welsh language skills” with a higher proportion in north west Wales (33%) compared to 3% in south east Wales.
- Medium to large businesses (over 50 at the location) are as likely to have a need for Welsh language skills as micro businesses (2-4 employees).
- In terms of language needs, speaking and listening skills are perceived as being more important than reading and writing skills;
- Sector variance was noted in terms of needs – “Agri-Food, Media, Tourism and Leisure and Finance and Business Services sectors showed higher levels of Welsh language skills needs than the Care or Retail sectors.”
- Of the great majority of businesses that did not recognise a need for Welsh language skills, 11% foresaw the situation changing within the next 5 years, indicating a small potential increase in demand for Welsh language skills.
- Most businesses had limited experience of Welsh medium or Welsh language training.
- 29% of all respondents indicated that their customers liked to be offered the choice of either English or Welsh. Further evidence outlined in the report shows that 20% of respondents considered that having the right Welsh language skills was important to the success of their business.
- The report highlighted a number of themes and policy issues to be considered by the Future Skills Wales Partnership and others. These included the need to improve awareness amongst the private sector as to the potential commercial benefits of the Welsh language, particularly in terms of customer retention and new market penetration. In this context, the need to integrate Welsh language planning with the Economic Development and Skills/Training policy agendas was identified as a priority in engaging the private sector.
- The need to mainstream Welsh language skills as a component within more generic training such as customer care was identified. A key reason for this is that Welsh businesses seem to view the ability to speak, read or write Welsh not to be a skill as such, but more of a naturally occurring attribute. The report identifies this perception as a potential barrier to the further development of Welsh language skills as a commercially and economically advantageous tool.

## 2. Focus Groups to consider the use of the Welsh language in the Private Sector by Mabis – on behalf of the Welsh Language Board (2007).

The ten focus groups findings and subsequent recommendations were as follows:

- There is wide acknowledgement that the Welsh language offers a commercial/economic advantage to private sector businesses. Oral use is the main use made of the language within businesses at present, which points to a need for specific measures to encourage the use of the language visually as a written and as a business language.
- There is a general desire to make further use of the language within businesses, but at the same time a skills deficit creates frustration and therefore encouragement and support are needed to capitalise on the goodwill.
- There is a lack of awareness among businesses about the assistance that the Welsh Language Board and others are currently able to offer regarding Welsh language support.
- Some sectors are traditionally less likely to make use of the Welsh language than others.
- Geographical areas vary in relation to the demand for bilingual services, the ability of businesses to provide bilingual services, and the support available to assist businesses that wish to be more bilingual.
- Businesses do not know enough about their customer profile in relation to providing a suitable bilingual service and how customers react to bilingualism.
- There is a need to develop Welsh skills within the workforce and employers need assistance to measure the Welsh skills of workers and potential workers, especially when recruiting staff to positions where the Welsh language is key.
- The economic advantages of bilingualism and the Welsh language need to be defined, packaged and disseminated proactively among businesses.
- In relation to increasing the use of the Welsh language in the private sector, Welsh-speaking business owners need to be targeted to ensure the greatest increase with the available resources.
- There is also a need to consider how to associate the Welsh language with wider regeneration developments (by working with others) so that the Welsh language is linked with success and development, paying special attention to European funding opportunities such as the West Wales and Valleys Convergence programme.

The above findings were considered at the outset of this survey and were reflected in the Stage 1 and Stage 2 questionnaires. As a result it was possible to establish or rule out if elements of continuity in findings would emerge, thus determining in greater depth what specific factors drive attitudes towards the use of Welsh. Furthermore the Welsh Language Board has in recent years commissioned surveys to glean the Welsh public's views about the Welsh language, a summary of which follows:

### **NOP Survey 1995**

- 71% of respondents were in support for the use of Welsh throughout Wales;
- 77% were of the opinion that the Welsh language is an advantage to Wales;
- 88% were of the opinion that Wales should be proud of the language;
- 75% were of the opinion that Welsh and English should have equal status;
- 82% said that bilingual signs were a good idea.

### **The Beaufort Review 2008**

- 74% of respondents were of the opinion that Welsh is an asset to Wales ;
- 82% considered Welsh to be something to be proud of;
- 73% considered Welsh as belonging to everyone in Wales.

### **Context**

The Welsh Language Act 1993 does not place a duty on the private sector to prepare Welsh Language Schemes. However some bodies have decided to provide bilingual services and/or a Welsh Language Scheme, whilst others have been named as public bodies under section 6(1) (b) of the Act and others provide public services via procurement with the public sector and are duty bound to comply with the relevant sections of the public body's Welsh Language Scheme. One of the targets in 'Iaith Pawb – A National Action Plan for a Bilingual Wales' is that by 2011 "more services by public, private and voluntary organisations are able to be delivered through the medium of Welsh." 'Iaith Pawb' also states the need to close the disparity between research and information about the Welsh language and the importance of policy based on evidence.

### 3. Methodology

Mindful of the fact that some previous surveys regarding the Welsh language in the private sector have proved problematic in terms of securing participation, the following methodology was adopted:

#### **Stage 1**

On the basis that there are approximately 85,000 VAT-registered businesses in Wales, between 800 – 1,000 businesses were targeted from organisations either via databases of private sector businesses or umbrella organisations representing businesses in Wales. This included the Welsh Assembly Government, Welsh Language Board, the Welsh branch of the Confederation of British Industry (CBI), Federation of Small Businesses (FSB), Chambers of Commerce and Mentrau Iaith Gymraeg. The survey targeted sectors and businesses providing direct services to the public in Wales rather than those businesses providing a specific or expert service to a defined target audience. These were the very sectors targeted in previous research studies with the intention of establishing whether or not there was a collaborated link and continuity between findings – in particular in terms of views and attitudes towards the Welsh language. Furthermore a balance reflecting and representing the varying use of Welsh amongst private sector businesses would be required along with a balanced geographical representation and in terms of business size (small, medium and large). Businesses in the following sectors were targeted – supermarkets, financial, retail, hospitality & tourism, sports, organisations representing the business sector, vehicle dealers, showrooms and garages, utilities, third sector, information and communication technology (ICT), business consultants, transport and legal/business services.

#### **Stage 2**

By direct email to businesses and representative organisations participation was sought by completing an online questionnaire (**Appendix A**) or alternatively for a fieldworker to telephone and conduct an interview based on the questionnaire. A response rate of 30% or 250 responses was met with 258 businesses completing questionnaires, mostly online.

### **Stage 3**

From the initial 258 businesses who participated in Stage 1 a sample of 60 (or 24%) businesses was drawn up and invited to participate in face-to-face interviews or an in-depth questionnaire (**Appendix B**) – in accordance with the linguistic use, geographic spread and size factors initially adopted. Site visits would also include observing use of Welsh in terms of corporate identity, signage, documents and forms, reception and telephone greeting.

The fieldwork was undertaken by CBRmi team of four experienced bilingual researchers between June and October 2009 and data input and analysis conducted by CBRmi's research analyst between November and December 2009. In accordance with the Welsh Assembly Government's statutory Welsh Language Scheme all fieldwork materials and communication was bilingual and in accordance with the language choice of participants in all instances. Written translation work was undertaken by Canolfan Bedwyr, the language services unit at Bangor University.

## 4. Findings – Stage 2 initial questionnaire

The findings in terms of answers to questionnaires completed by 258 private sector businesses are presented, supported by relevant charts where appropriate. The findings are organised according to some key themes for the project’s objectives.

### 4.1. Region

Wales was broken down into three regions which comprised the following counties:

North (Gwynedd, Anglesey, Conwy, Denbighshire, Flintshire, Wrexham)

Mid (Ceredigion, Powys)

South (Cardiff, Newport, Caerphilly, Blaenau Gwent, Monmouthshire, Torfaen, Swansea, Neath Port Talbot, Bridgend, Rhondda Cynon Taff, Merthyr Tydfil, Vale of Glamorgan, Pembrokeshire and Carmarthenshire)

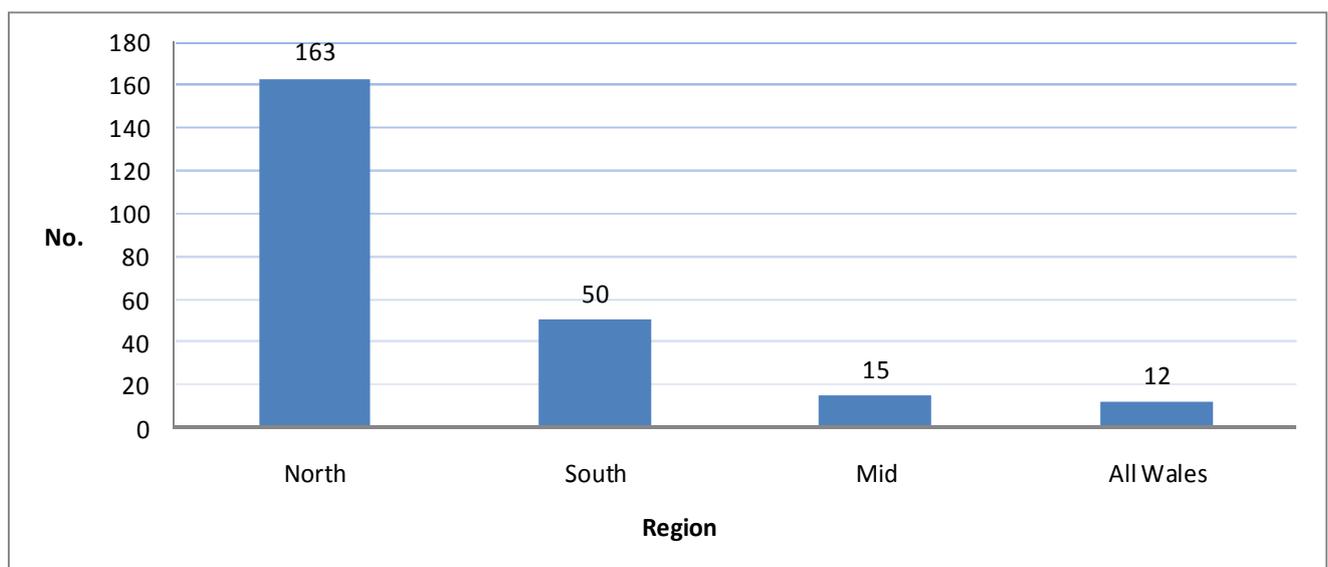


Figure 1: Regional breakdown of survey responses.

The initial fieldwork yielded a greater proportion of responses from businesses based or serving the north (68%). A number of factors may have contributed to this. Firstly, the available data sources provided good coverage of north Wales, compared with mid and south Wales. Also, the higher frequency of Welsh speaking natives within north Wales may have resulted in the survey having greater resonance for them and their business.

Recruiting mid Wales businesses was problematic from the outset in that accessed databases had an under-representation from Ceredigion and Powys. Thus great care should be taken in interpreting the quantitative results for mid Wales.

It should be stated that north Wales comprises around a quarter of all VAT-registered businesses within Wales. Since the survey has returned a majority share of responses from the north, the sample is not representative of the total population.

**Note the 'All Wales' definition which is as follows: Businesses with multiple locations in the different regions of Wales.**

#### **4.2. Welsh usage category**

Respondents were categorised according to their attitude towards using the Welsh language with their customers. Broad categories of positive, neutral and negative were applied, based upon their response to a question addressing their level of Welsh usage. The categories were as follows:

- Positive: Complete Welsh language customer service;  
Visible, spoken and written.
- Neutral: Only respond to requests for service in Welsh;  
Visible only – bilingual literature, web, signage;  
Interpersonal / spoken only.
- Negative: No Welsh language provision at all.

The findings are summarised in Figure 2. Just over one fifth of respondents demonstrated a positive approach towards the use of the Welsh language, whilst almost half of the respondents are open-minded (neutral) in terms of using Welsh. Therefore in language planning terms there appears to be some scope for promoting the use of Welsh amongst private sector businesses in Wales. This seems to be more positive than the Beaufort Research findings (ranging from between 9% and 18%) and seems to fall more in line with Mabis (2007) qualitative findings.

Note that 28 respondents yielded 'unknown' results and are labelled as 'Other'.

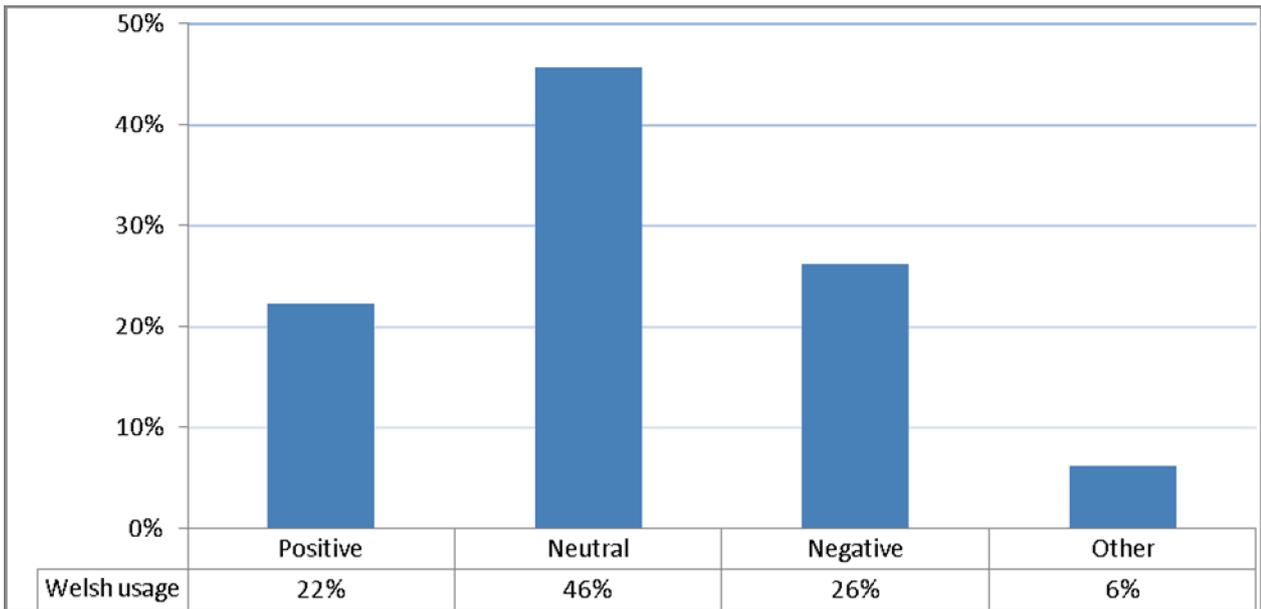


Figure 2: Welsh usage category results breakdown.

Figure 3 dissects this breakdown of Welsh language usage according to the region the business operates in.

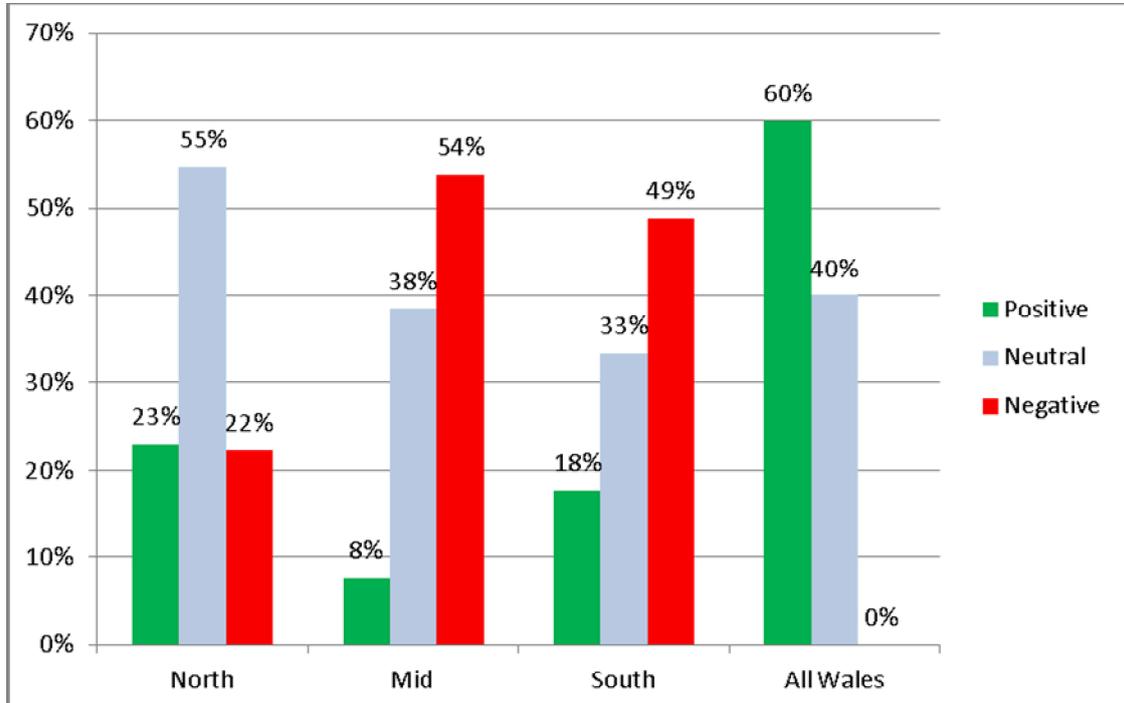


Figure 3: Breakdown of Welsh usage categories according to region.

The following observations can be drawn from this chart:

- Of the three regions, north Wales has the greater percentage of organisations in the positive category and the lowest percentage in the negative category.
- Mid Wales shows a highest proportion of negative businesses. However, this comment should be tempered by the very low sample size of the region.
- Those companies that fall into 'All Wales' (see note above) demonstrate considerably better performance than any of the three regions. Again, small sample size and the fact this category is likely to comprise mainly large firms should temper this observation.

### 4.3. Geographical spread

Respondents were asked to state the geographic spread (or breadth) of their business – i.e. where they trade. The intention of asking this question was to assess whether the breadth of the business's sales activity has any impact upon their adoption of Welsh language communication means. The overall results from this question are summarised in Figure 4 below.

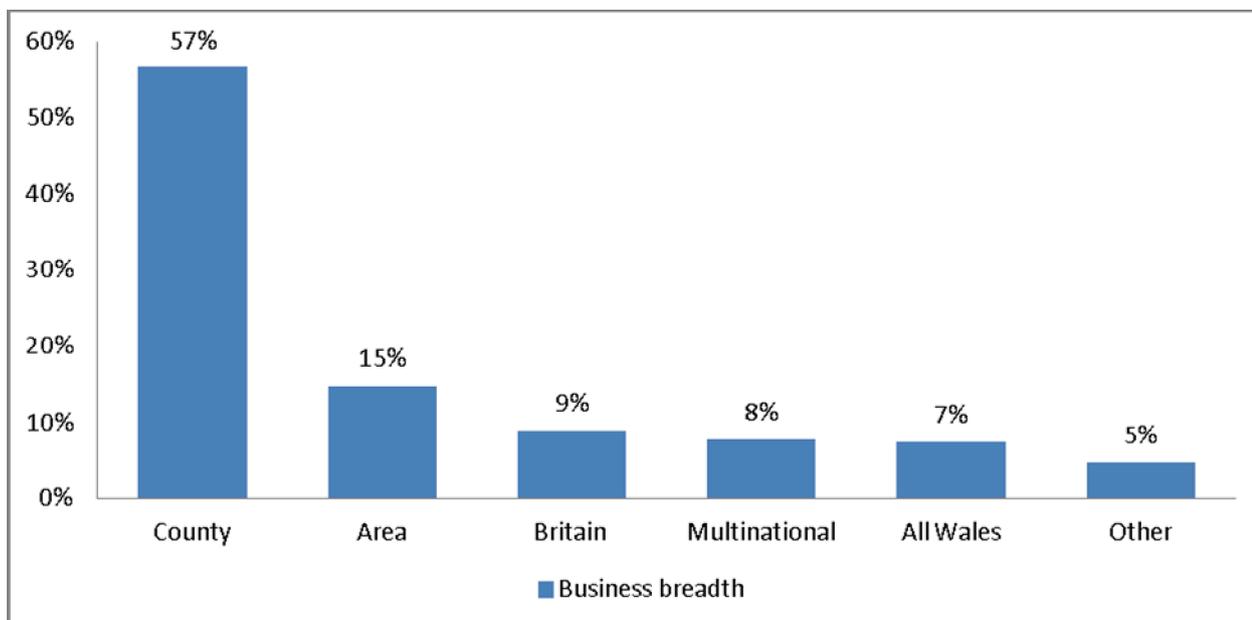


Figure 4: Geographical spread of respondents.

For this question, 'area' was an open-ended option, whereupon the respondent was requested to state how their area was defined. Typical responses were *north Wales, Gwynedd and Anglesey* and specific towns such as *Caernarfon*. Multinational represented businesses that operated overseas, whilst 'All Wales' comprised organisations with operations across each of the three regions of Wales.

The findings show that the majority of businesses responding to the survey operate only within the county within which they are based.

#### 4.4. Number of employees

The term micro-business is used to define companies with ten or fewer employees. From the profile of survey respondents, summarised in Figure 5 below, 63% of responding businesses fall into this category.

The Small to Medium Enterprise (SME) category applies to businesses with 250 or fewer employees and includes micro-businesses as a subset. Therefore 96% of all responding businesses fall into the SME category. Around 85% of the total sample comprised 0-50 employees and are classed as 'small' whilst 11.6% fall into the 'medium' enterprise category.

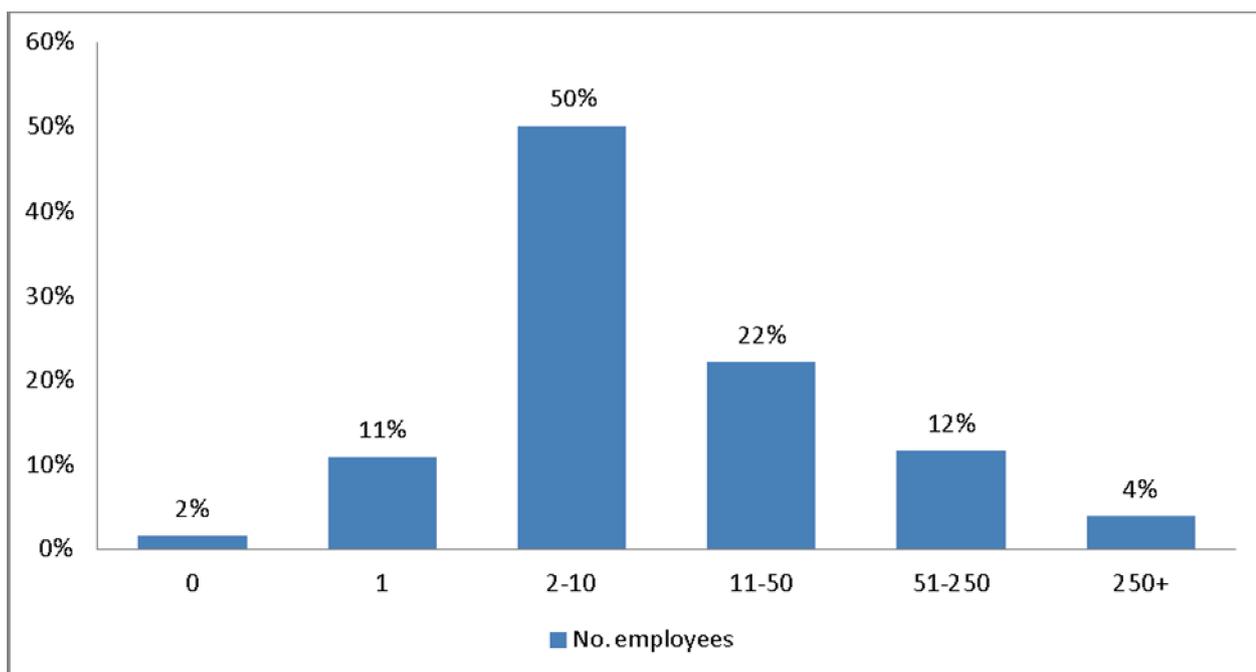


Figure 5: Breakdown of respondents' number of employees.

Statistics published by the Department for Business, Innovation and Skills (BIS) in 2007 showed that of the 4.7 million businesses in the U.K., 99.9% were SMEs. Against these published findings, our sample is consistent, but has slightly greater weighting on large companies (over 250 employees). This was necessary to ensure sufficient representation within this group in order to make comparisons meaningful and provide some useful qualitative case studies.

#### 4.5. Percentage of Welsh-speaking staff

The results from this question are summarised in Figure 6. It shows that 70% of the 223 that provided a meaningful response had some level of bilingual skill at their disposal. Of the businesses with some bilingual skill, 36% had a high percentage of Welsh speakers (81%-100%), whilst 28% had a low percentage (1%-20%).

It is perhaps significant to note that of the 70% of businesses having some bilingual skill capacity, only 22% could be categorised as taking a positive approach concerning the language with customers (see section 4.2 above).

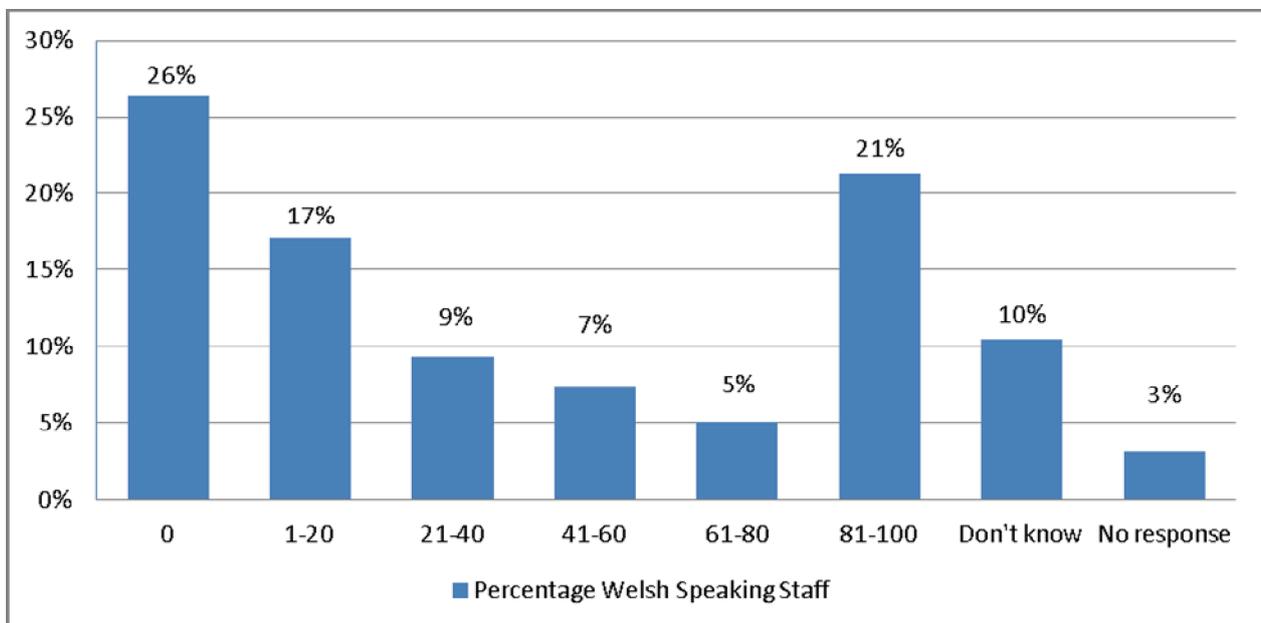


Figure 6: Breakdown of the percentage of Welsh speaking staff.

Figure 7 demonstrates how the size of the organisation impacts upon the levels of Welsh spoken by staff. Both the micro and SME categories have broadly similar distributions of Welsh – a significant percentage having none/very few Welsh speakers and around a quarter of staff having a very high complement of Welsh speaking staff. In contrast, all of the large organisations reported the lowest category for the percentage of Welsh speaking staff.

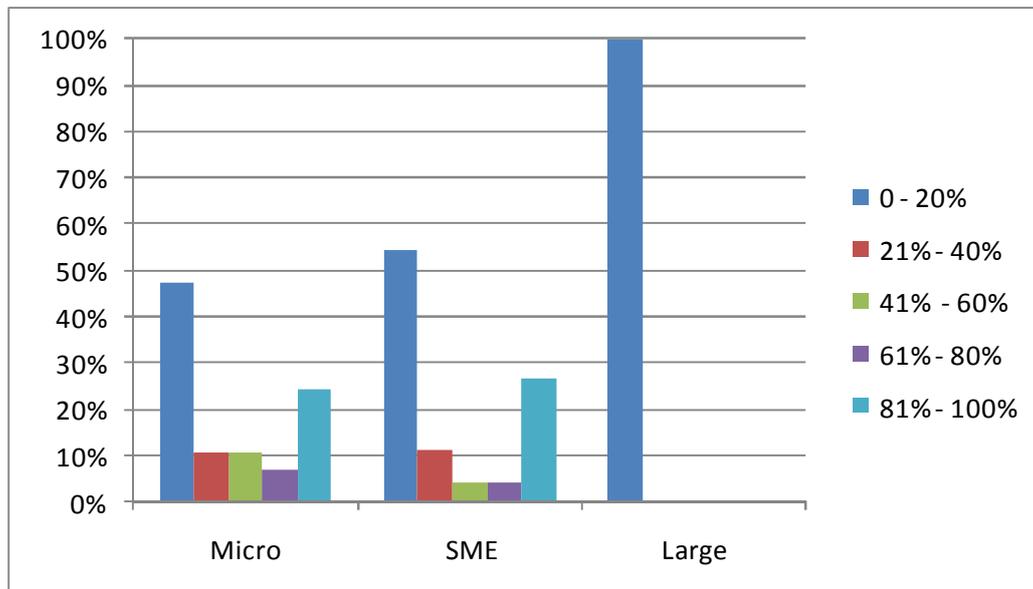


Figure 7: Breakdown of Welsh speaking staff by company size.

## 4.6. Industry sectors

The respondents were asked to summarise their business activity according to their [Standard Industrial Classification of Economic Activities \(SIC\)](#) sector definitions. The results of this question are summarised in Figure 8 below. Respondents were given the option of specifying 'Other' and in fact this returned the greatest number of responses. This indicates in itself either a lack of clarity, or an ambiguity in respect to sector classifications.

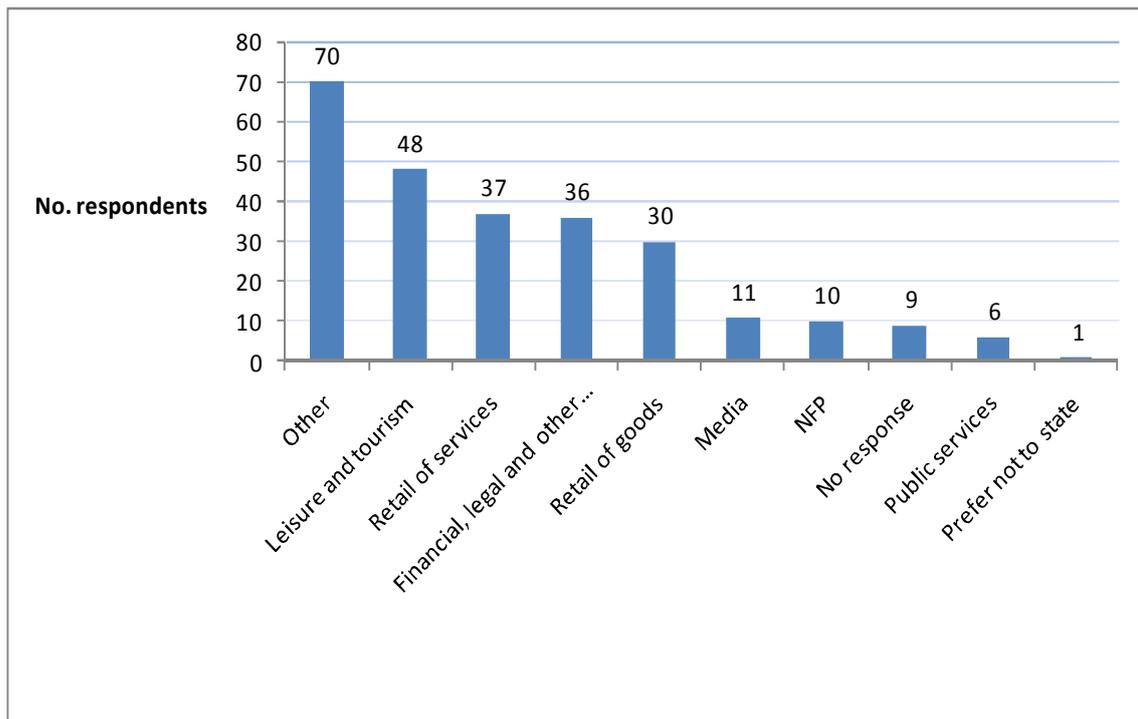


Figure8: Breakdown of businesses by sector.

Of the respondents that were able to classify their business, the four sector categories that provided the greatest volume of responses were:

- Leisure and Tourism;
- Retail of services;
- Financial, Legal & other professional services;
- Retail of goods.

Figure 9 outlines the differences between sectors in respect of their usage of Welsh. The sectors have been ordered according to their positivity towards the use of Welsh. The following observations can be drawn from this chart:

- The not-for-profit (NFP) and media sectors have the greatest percentage of positive Welsh usage (50%), with the NFP sector having no responders falling into the negative usage category.
- The media industry demonstrates a similar profile to the NFP sector, reflecting findings of previous studies.
- Sectors such as financial, legal and other professional services show strong polarisation between positive and negative use of Welsh.
- NFP and public services were the only two sectors to have no respondents in the negative Welsh usage category.

Table 1 gives a full breakdown of all the figures. Analysing and ranking sectors that offer varying degrees of proactive service in Welsh – from a visible only service to a complete service (ignoring those that only respond to requests for service in Welsh) – the NFP sector ranked highest with 75% of businesses offering some kind of Welsh provision, followed by leisure & tourism at 66%, retail of services with 63%, public services with 60%, financial & legal with 57% and media with 50%. Because of the polarisation between positive and offering only a reactive service, media’s overall score is comparatively low which makes for interesting comparisons with earlier survey findings where the media sector has reported the highest stated need for Welsh languageskills<sup>4</sup>.

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<sup>4</sup> Future Skills Wales Survey – Welsh Language Skills in Seven Sectors, Beaufort Research and Menter a Busnes, March 2005.

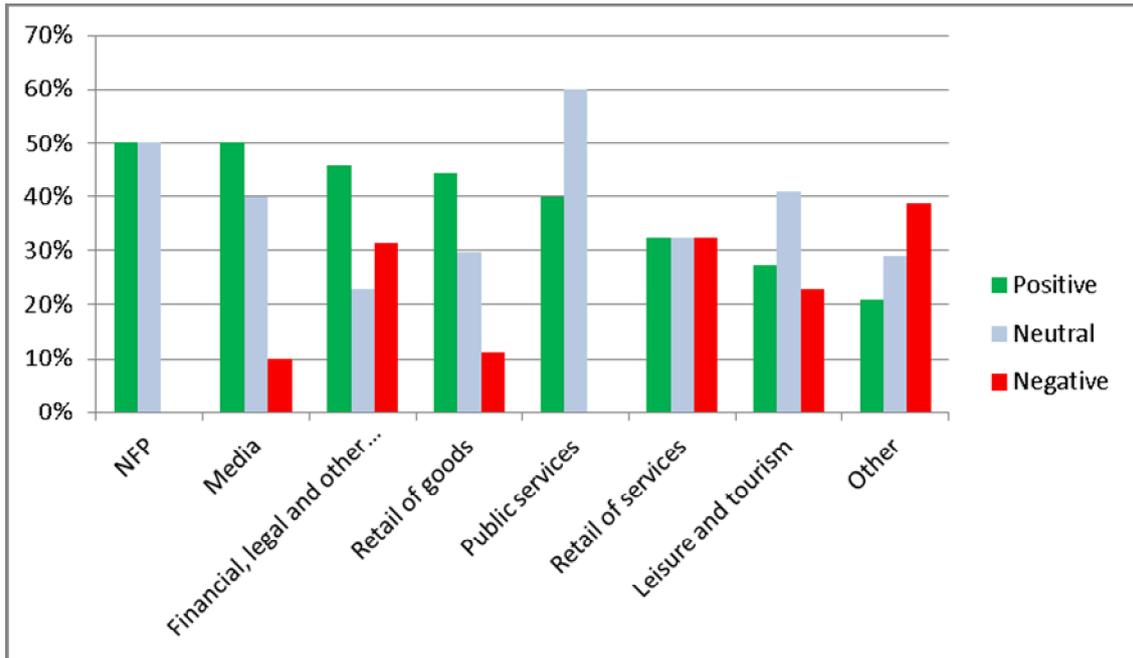


Figure 9: Breakdown of Welsh usage category by sectors.

Sector	No Welsh language provision at all	Only respond to requests for service in Welsh	Visible only	Inter-personal/spoken only	Visible, spoken and written	Complete Welsh language customer service	Other
Other	39%	15%	2%	13%	15%	6%	11%
Media	10%	40%	0%	0%	30%	20%	0%
Financial, legal and other professional services	31%	11%	3%	9%	23%	23%	0%
Public services	0%	40%	0%	20%	0%	40%	0%
Leisure and tourism	23%	2%	23%	16%	20%	7%	9%
Retail of services	32%	12%	12%	9%	26%	6%	3%
Retail of goods	11%	11%	7%	11%	26%	19%	15%
NFP	0%	25%	25%	0%	13%	38%	0%

Table 1: All results by sector

## 4.7. Policies

Businesses were asked to provide details of which of the following policies they had adopted from a list of six common policies. The objective of asking this question was twofold. Firstly, to establish the extent to which respondents had placed Welsh language provision on a formal footing by adopting a written Welsh language policy. Secondly, whether there was indeed a link between adopting general 'equalities' related policies and a Welsh language policy as part of the broader equalities and customer care agenda.

Figure 10 summarises the results. It demonstrates that 40% of respondents confirmed they had a written Welsh language policy. However, all other policies raised, with the exception of a *diversity policy*, had greater levels of implementation than the Welsh language policy. One mitigating factor should be considered – namely that sole traders and small to medium enterprises may lack the bilingual capacity required to deliver services in the medium of Welsh, which will negatively influence their potential to implement a language policy. This view is supported by the chart shown in Figure 11 which demonstrates the disparity in policy implementation according to the size of the organisation.

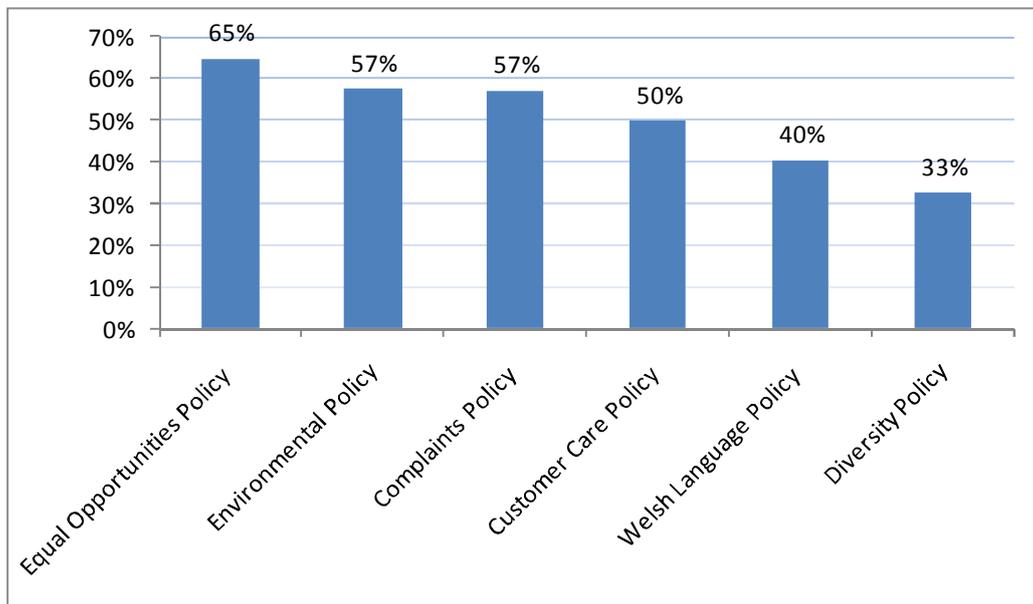


Figure 10: Breakdown of policies adopted by respondents.

On one level the result seems to contradict previous findings under section 4.2 where only 22% respondents made positive use of Welsh. One possible explanation is that respondents defined as adopting neutral use of Welsh could have a Welsh language policy in place, but in the absence of any statutory requirement, such policies can vary greatly in terms of commitment and provision. Finally, it is possible that aspects of a Welsh Language Policy can be enshrined in a wider Equalities or Equal Opportunities Policy.

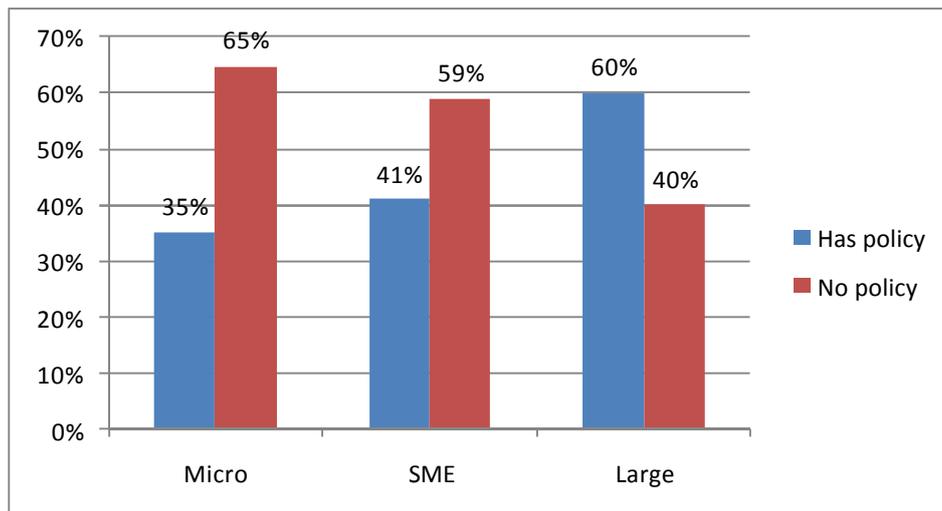


Figure 11: Breakdown of language policy implementation by company size.

#### 4.8. Percentage of staff using Welsh with customers

The results of this question are summarised in Figure 12. In total, 41% of the 258 businesses had no employees that actively engaged with customers in Welsh. Of the remaining 50% of businesses that provided a response, 25% had a minority (1%-20%) of employees using Welsh with customers. Only 11% of businesses reported a high percentage (81%-100%) of employees actively engaging with customers through the medium of Welsh.

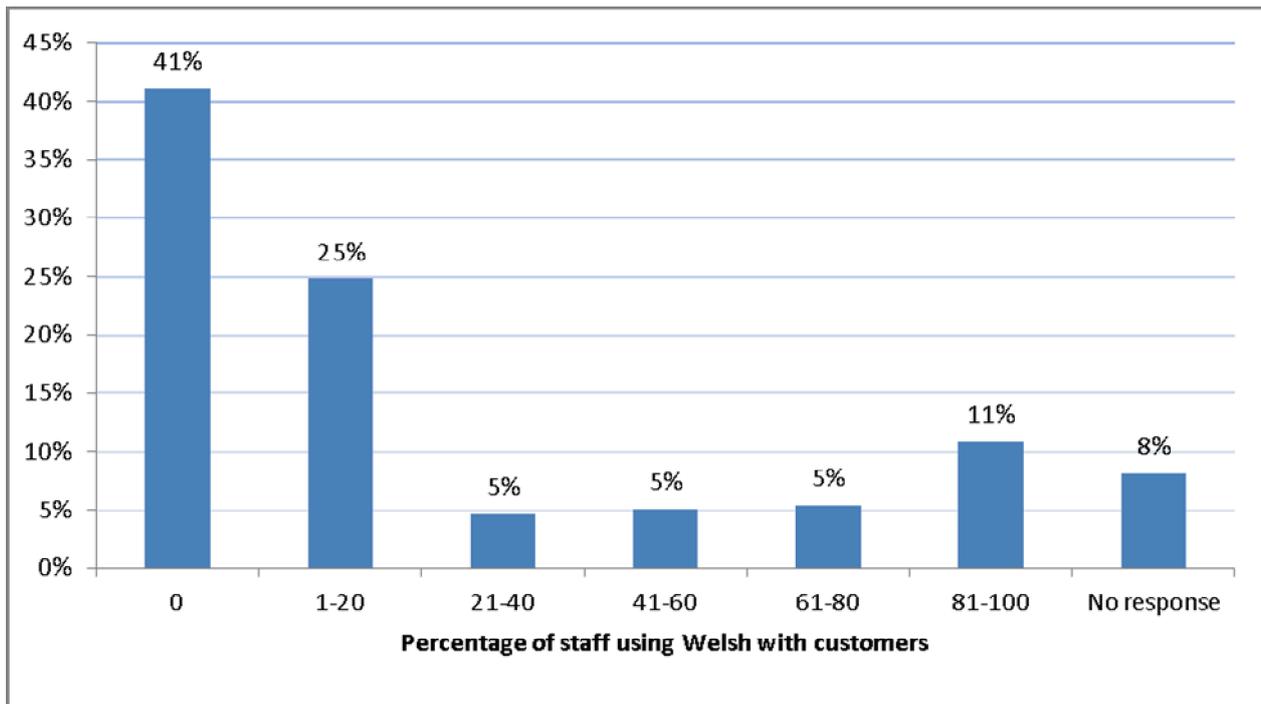


Figure 12: Breakdown of respondents' use of Welsh with customers.

Some mitigating circumstances may be present here. For example, some of the respondents may be unaware of their employees' linguistic skills; there may be a low emphasis on offering services in Welsh, or a reluctance / incapacity to respond to customer demand.

#### 4.9. Percentage of bilingual customers

This question reverses the one summarised in section 4.8 above, by focussing instead on the Welsh language ability of the respondents' customers. 14% of the businesses deal entirely with customers unable to speak Welsh. Most commonly, in 43% of cases, a low number of their customers (i.e. 1%-20%) are estimated to have a bilingual capacity. Only 3% of the businesses that provided a response deal with customers who are mostly bilingual (81%-100%).

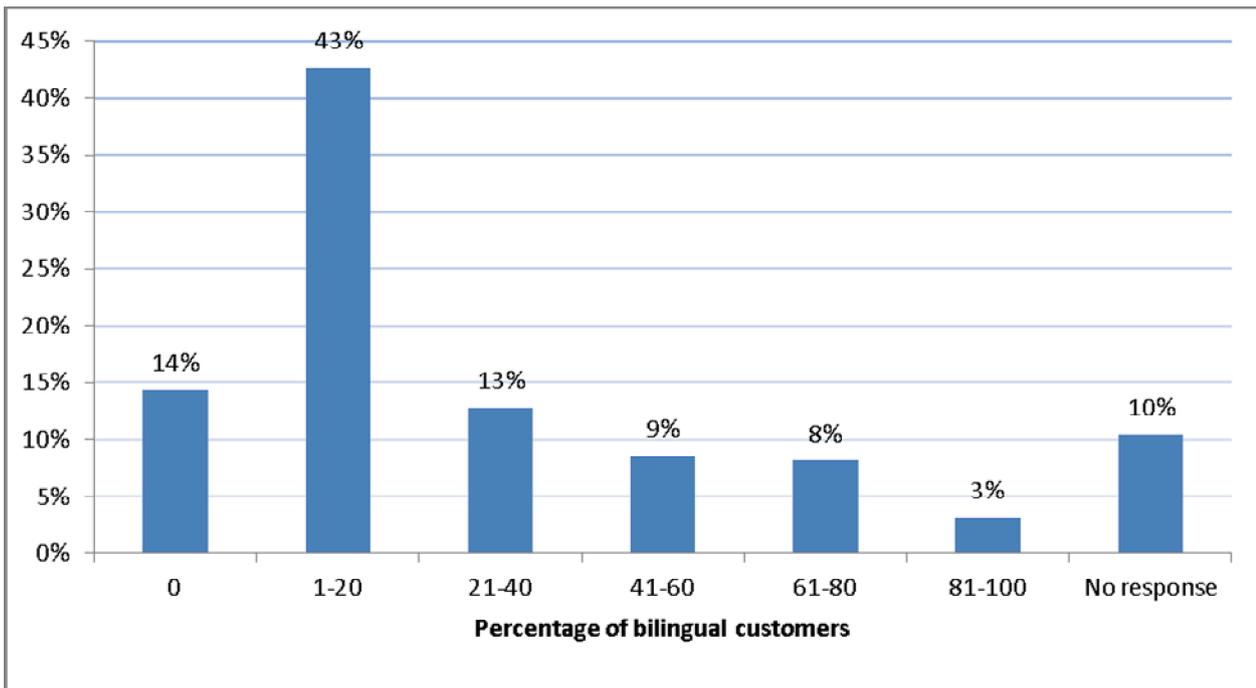


Figure 13: Breakdown of percentage of bilingual customers reported by each respondent.

By taking this question and the previous one (section 4.8) together, a deeper analysis identifies the two extreme scenarios in respect to the demand and supply relationship - namely, those situations where the potential language needs or preferences of the customers are not being met, and those where an existing provision in employees is not being utilised with customers.

Figure 14 maps out all of the respondents according to their percentage of staff speaking Welsh and their percentage of customers using Welsh. Typically, one would expect these two elements to concord – the ‘demand’ for Welsh from customers should be met with ‘supply’ from staff. Conversely, in areas where Welsh is not typically spoken, the need to hire bilingual staff is reduced. The ideal scatter for this graph would be around a 45° straight line passing through the origin.

Of particular interest are the cases in Figure 14 where the supply and demand levels do not concord. The first consists of organisations that could potentially face demand for Welsh that is not being met through a lack of bilingual staff (marked by the blue rectangle). A caveat should be applied that the presence of a high number of Welsh speaking customers does not necessarily equate to a demand for a service Welsh language service. That aside, these three particular cases

are worthy of attention since over 60% of customers are Welsh speaking yet there is no supply of Welsh speaking staff.

Some particular features of these three organizations are:

- all three were based in the north;
- all three were micro businesses; and
- two of the organizations were in the retail of services sector, the other was in the financial services sector.

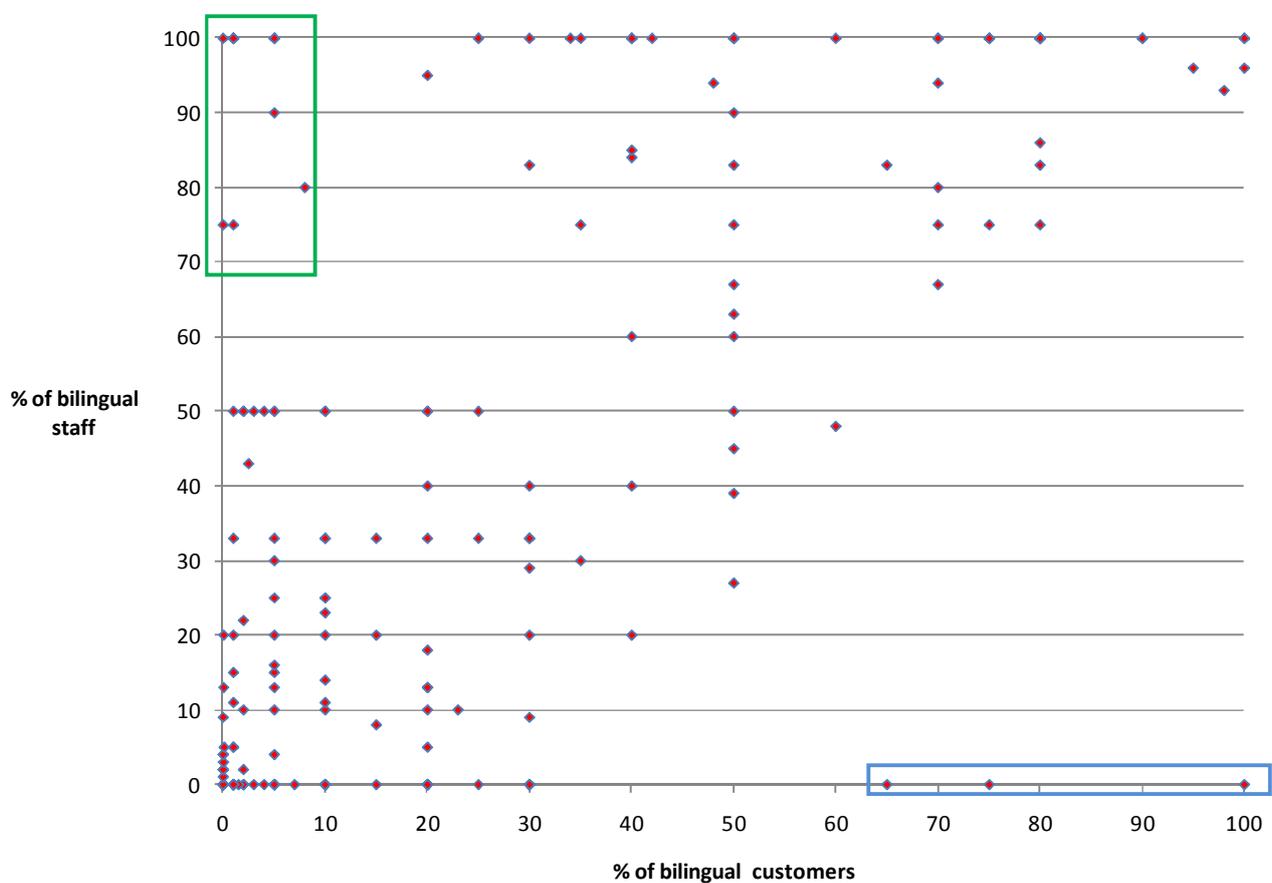


Figure 14: Mapping of respondents by 'staff supply' and 'customer demand' of Welsh.

The second case is the opposite situation where an organisation has adequate bilingual provision in an area with low customer demand (marked by a green rectangle). Seven organisations where the staff's ability to communicate in Welsh is probably being under-utilised were identified (i.e. over

70% of staff speak Welsh but it is the organisation's belief that less than 10% of their customers require it).

Notable features of these organisations were as follows:

- four completed the survey in Welsh; three completed it in English;
- six were based in north Wales, the seventh was based in the south;
- all companies were micro-businesses; and
- two were in the leisure and tourism sector, two were in the retail of services sector, two were in the media sector, whilst one was a NFP organization.

#### 4.10. Degree of Welsh provision

Figure 15 summarises the results of this question. The main conclusions are as follows:

- Only 12% of respondents had a complete Welsh language customer service compared to 23% who had no Welsh language provision at all.
- Just under half of respondents provided some form of service in Welsh (from complete service to visible only).
- A further 11% provided reactive provision.
- In total, 61% provide some provision in Welsh which correlates with the findings in section 4.5 where 60% of respondents have some bilingual skills at their disposal.

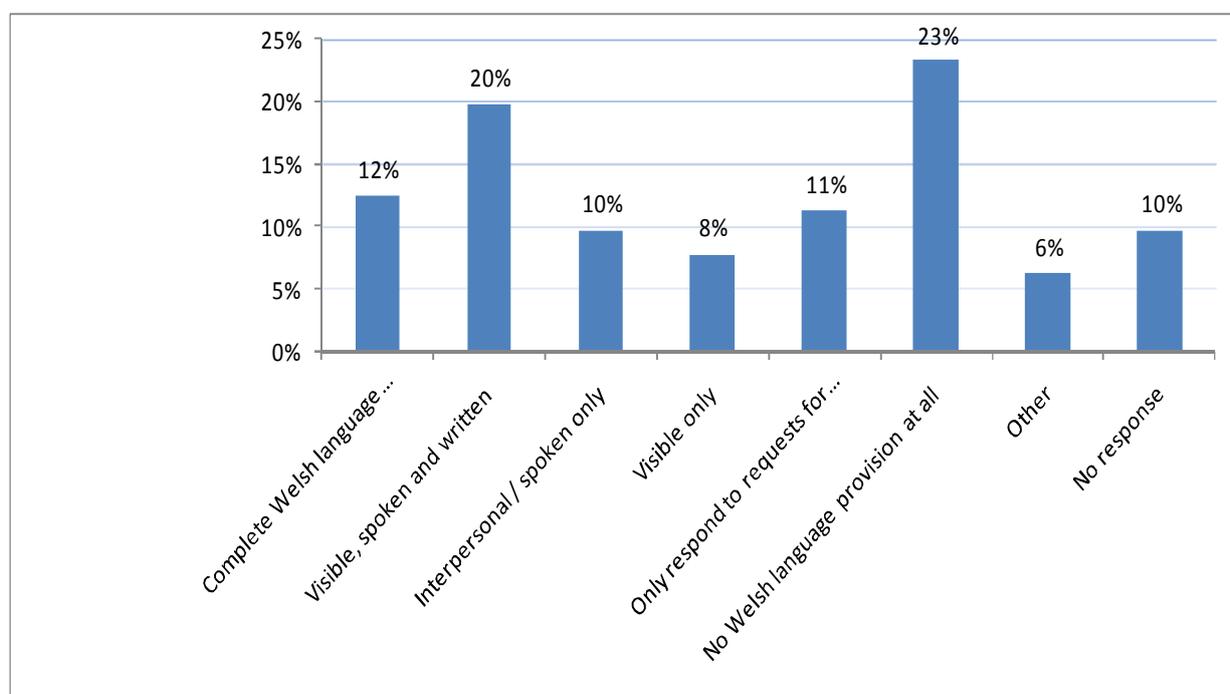


Figure 15: Breakdown of the stated level of Welsh provision.

Figure 16 shows the breakdown of the two extreme categories (*complete service* and *no provision*) in terms of the regional share. For example, 10% of the responses from the north were in the 'complete service' category.

This comparison underlines the differences in Welsh language profile of the three regions. Mid Wales is particularly polar – businesses typically provide a complete service, or none at all, with

little in between. In contrast north Wales has considerably greater diversity of provision. In south Wales over 40% of businesses have no Welsh language provision.



Figure 16: Regional breakdown of 'Complete service' / 'No provision' responses.

#### 4.11. For those with some Welsh provision: reasons for the situation

Figure 17 summarises the reasons given for providing a Welsh language service from those companies that do so. It should be noted that respondents were given the option to state 'yes' to multiple entries.

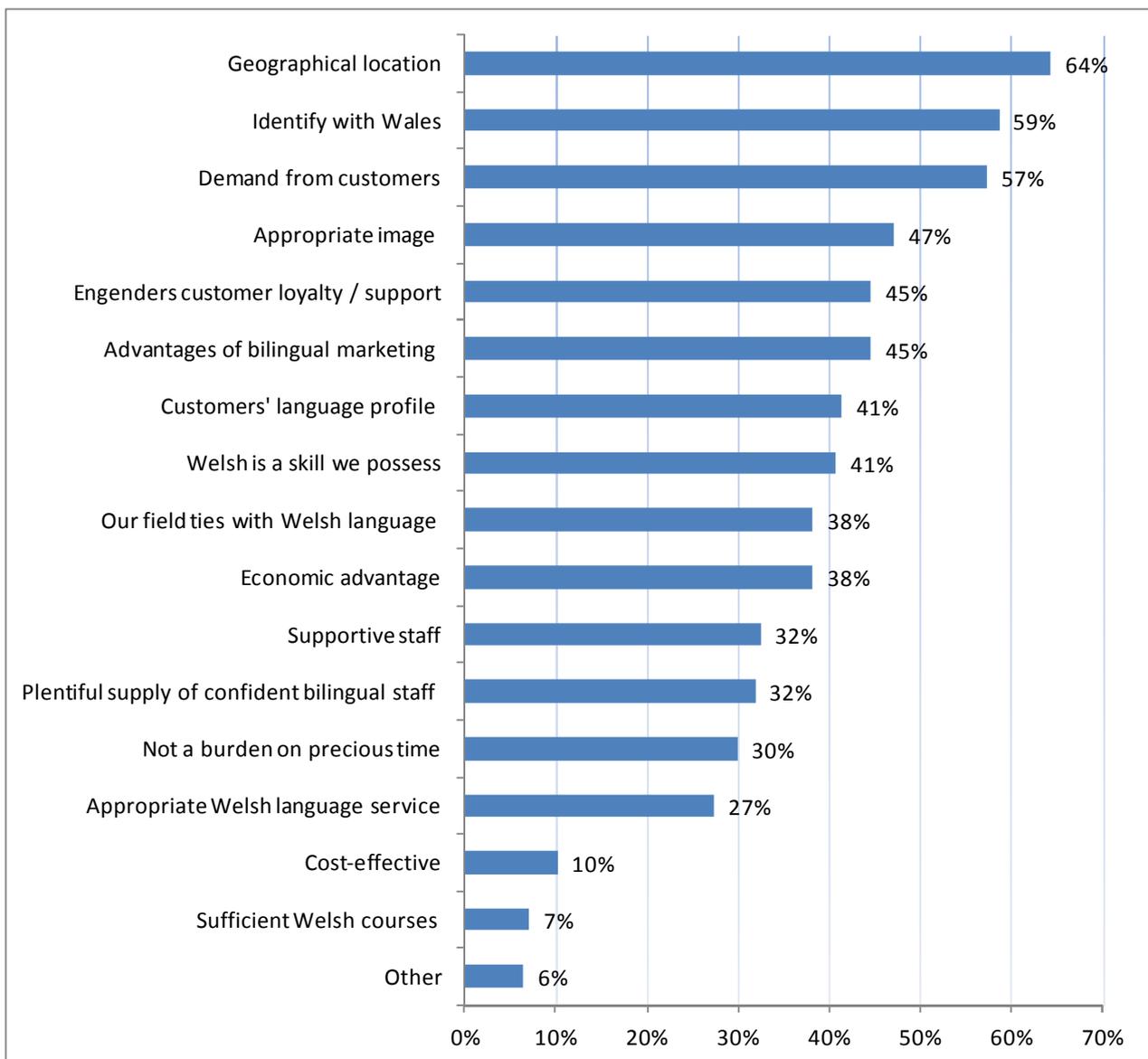


Figure 17: Breakdown of reasons given for providing a Welsh language service.

Amongst the 157 (60%) of all respondents that currently provide a Welsh language service, the most common reason for doing so was geographical location (64%). This is no doubt allied to

customer demand (57%); their linguistic profile (41%), and a desire to engender customer loyalty/support (45%).

Other reasons which featured prominently were a desire to identify with Wales (59%) and to create an appropriate image (47%). It is worth highlighting that 38% felt they gained an economic advantage, whilst only 10% believe it to be cost-effective to provide a service in Welsh. These findings need to be compared with those given below under Section 4.12.

#### **4.12. For those with no Welsh provision at all: reasons for the situation**

Figure 18 summarises the reverse of that described above. In this case, the 60 respondents that stated they offered no Welsh language provision explain their reasons for not doing so. Once again, respondents were able to state 'yes' to multiple entries.

The most common reason given was a lack of customer demand (75%). The second and third most common reasons were the Welsh language not being a skill (38%) and no economic advantage (37%).

Almost a third stated that it had a shortage of confident bilingual staff whilst one quarter specifically recognised geographical location as a reason.

The findings here and above reflect a clear dichotomy between the groups of businesses that differ in language use.

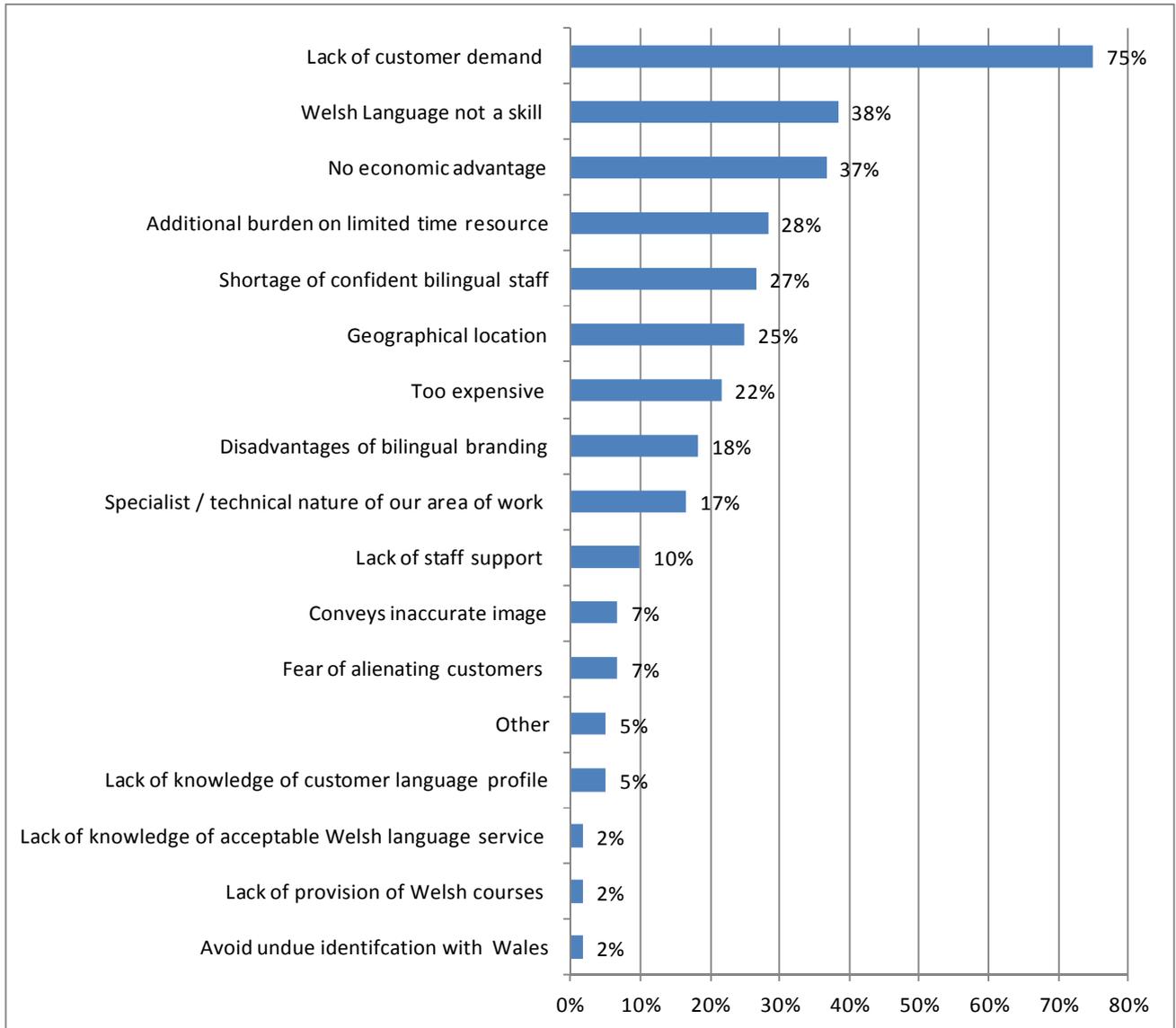


Figure 18: Breakdown of reasons given for not providing a Welsh language service.

## 5. Findings – In-depth questionnaire/ interviews

On the basis of the initial 258 completed questionnaires in September 2009 the findings were filtered and categorised into three main groupings –positive, neutral and negative use in terms of a Welsh language customer service provision. Furthermore, businesses were categorised into micro, SMEs and large along with a geographical split – north, mid/west and south Wales. On this basis 60 businesses were identified to participate in a further in-depth questionnaire by means of face to face interviews. The sample was stratified accordingly as shown below.

Geographical area	Positive use of Welsh	Neutral use of Welsh	Negative use of Welsh	Total
North Wales	8	6	8	<b>22 (37%)</b>
Mid/West Wales	4	5	4	<b>13 (22%)</b>
South Wales	7	10	8	<b>25 (42%)</b>
<b>Total</b>	<b>19 (32%)</b>	<b>21 (35%)</b>	<b>20 (33%)</b>	<b>60 (100%)</b>

The initial aim was to conduct all interviews face to face and to record them with dictaphones. However two things became apparent from the outset when inviting participation by phone – the reluctance of a quarter of businesses to set time aside for face-to-face interview and that recording interviews could hamper the confidentiality of the process and possibly thwart responses to the questionnaire. Therefore between October and November 2009, 25 interviews were undertaken by telephone (with 35 face-to-face interviews) with none being recorded using a dictaphone. However, all interviewers made written notes during interviews – in addition to completing the in-depth questionnaire on behalf of those being interviewed.

Some vignettes of the main qualitative findings and quotations are described below:

## **Positive use category**

In general, respondents had not formally assessed how much of their business was held in Welsh, and as a result they relied on estimates only. Both Beaufort Research/Menter a Busnes and Mabis research highlight this issue, and in terms of strengthening and fine-tuning the emphasis on meeting customer needs this dimension should be considered further.

The ethos of this media production company was Welsh and as a media company it was created to produce Welsh TV programmes. It is therefore natural for the company to operate and work in Welsh as the language is central to their business. It was a political act to choose to establish a Welsh speaking company, and the company is proud of its Welsh tradition.

A Public Relations Company stated that their company had a Welsh language policy in place before this was offered by the Welsh Assembly Government. A few of their customers would have wanted to see a copy of their Welsh language policy so they would have had one in place. Tendering for Local Authority public sector work above £20k meant having to submit a copy of the Welsh language policy<sup>5</sup>. They provide service and understand the Welsh speaking community in their part of north west Wales. 80% of their customers speak Welsh. Their business plan focuses on bilingualism and cultural awareness in Wales which is applicable to other contexts in other countries. They have now begun working in an African country. Often being sensitive to the use of a language is more important than having skills in that language. They felt that the idea of a Welsh limited company to satisfy the Welsh economic needs shows that Welsh does not hold companies back at all.

A UK-wide high street retail business had adopted a primarily visual only Welsh language policy with the assistance of the Welsh Language Board although they also employed eight bilingual members of staff out of 60 based in Wales. They saw offering a service in Welsh as a means of

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<sup>5</sup> This is an example of the policy driver of public sector tendering driving forward a requirement, which in this case goes hand-in-hand with the company ethos in regard to the use of the Welsh language.

engendering customer loyalty, and as a wish to identify with Wales, and felt it reflected a high awareness of customers' language profile.

A UK-wide organisation was in the process of adopting a Welsh language policy which would be implemented centrally from England. The organisation saw an advantage in bilingual branding, which created the right image and a desire to identify with Wales. Consequently the perceived value increases and gives the organisation an edge over its competitors. In terms of factors contributing to encouraging the increasing use of Welsh was 'feedback from customers' and 'evidence of demand'. Post-devolution it is interesting to note that some UK-wide businesses or chains seem eager to brand, affiliate or identify themselves with their Welsh customers, and the Welsh language is seen as one effective way of conveying this.

A sports club reported that because of their geographical location there is a business case for providing a service in Welsh but it was also a way to get local people to feel a sense of ownership of the club. Again this reiterates this and previous survey findings that geographical location plays an important role in determining attitudes and service provision in Welsh.

An ITC company worked with the Welsh Assembly Government to prepare and adopt a Welsh language policy. The factors determining the company's use of Welsh included 'conveying an appropriate image', 'geographical location', and 'engendering customer loyalty'. The company also offered IT training in Welsh which gave them an advantage over competitors. Further public sector contracts would encourage the company to make increasing use of Welsh.

A care and services business in south Wales had a Welsh Language policy which coincided with the Welsh Assembly Government's 'championing themes' guidelines for different policy areas with officers ensuring that all policy areas were considered. The company has a service in Welsh because it had identified customers' linguistic needs and it had a plentiful supply of confident bilingual staff. It also wanted to contribute towards sustaining the language. The economic advantage was that the

company emphasised the importance of communication and reinforced its good name by improving customer care.

A Housing Association (HA) had adopted a Welsh language policy as advised by the funder, the Welsh Assembly Government. Consequently the policy is formalised and forms part of induction training and handbook for new staff with annual linguistic skills surveys being undertaken to establish number and location of bilingual staff. The HA is a medium sized business; however the HA only provides a responsive and visual service in Welsh which may stem from the fact it only has three Welsh-speaking employees. However the HA wanted to identify with Wales and had a high awareness of customers language profile and had access to sufficient provision of Welsh language courses. Two additional factors for increasing the use of Welsh were an increase in demand amongst tenants and having an increasing pool of bilingual staff.

The above vignette highlights the positive role that Central Government can and has adopted in terms of creating linguistic choice for customers in Wales.

A music company was established in a fairly Welsh speaking area. They have created a culture to support the language in the area and this development is a means to strengthen the culture. Their customers expect a bilingual service and marketing is monolingual Welsh and bilingual depending on the situation. The main factors for using Welsh included 'wanting to identify with Wales', 'geographical location' and 'customer loyalty'. They believe that their bilingualism is an integral part of the fact that they are members of a bilingual community where they are based.

A publishing company based in an area with comparatively few Welsh speakers – serving both the public and private sectors had seen a huge increase in demand for a bilingual service since it began trading in the 1970s. However it had not adopted a Welsh language policy to date although eager to adopt professional best practice. Providing a Welsh service gave the company 'an economic/marketing advantage', 'identified with Wales' and it 'conveyed the appropriate image'. They stated that it was an advantage for them to be able to speak in their customers' language. The advantage of being a bilingual company brought them more and more work from large/medium

sized companies asking for bilingual materials/service. However, they had tried to recruit bilingual staff but without success.

This specific situation may in some ways reflect the knock on effect of Welsh Language Schemes in the public sector and the general public expectation that bilingual printed material is now the norm.

One of the reasons this publishing company provided a service in Welsh was to fill the demand in the market to supply goods for Welsh language bookshops, stationary and cards. Trying to appeal to Welsh speakers was considered very important, however they felt that the scope was wider than just that aspect.

A hotel business in a strong Welsh speaking area wanted to include more Welsh on its brochures because everyone else was doing it. Using Welsh showed support to the area and to staff. Customers felt more at home if they were able to converse in Welsh. The business saw additional custom because it could provide a service in Welsh – including an American learning Welsh – who wanted to return to stay at the hotel.

Again this vignette highlights the increasing importance of using and promoting the Welsh language as a unique selling point in the tourism sector as espoused by the Welsh Tourist Board and currently Visit Wales.

One recruitment agency located in a low Welsh speaking area but specifically targeting Welsh speakers undertook market research on bilingual skills needs of employers before adopting a Welsh language policy. The agency provides a service in Welsh because of the ‘specialist nature of their field which ties in with using the Welsh language’.

A travel firm based in a strong Welsh speaking area stated that the fact that they are a local company is important to them. They are a natural Welsh company employing local people. The company holds values that give added importance to the Welsh language. The respondent estimated that 70% of its service was conducted through Welsh.

A very large technology-based company established a memorandum of understanding with the Welsh Assembly Government and Welsh Language Board to service the national government in 2004. Appropriate prior market research was undertaken. To date 15,000 individuals have downloaded the company's Welsh language product. On-line language courses will be available in Welsh along with the latest version of a product. This company provided service in Welsh because of the 'advantages of bilingual branding', 'demand from customers' and a desire to 'engender customer loyalty/support'. The corporation stringently evaluated the economic/marketing advantage of using Welsh in business terms.

A sports club based in a strong Welsh speaking area felt that being 'Welsh' was important to the club – as it differentiated it from the other competing venues and gave it a competitive advantage. Welsh gigs and concerts are held at the club and the language dimension was seen as a selling point. The club tries to make the bilingual dimension a seamless part of the service which is not imposed on customers. For big sports events they felt the language gave no benefit or advantage, but for training local schoolchildren then it gave a big advantage; however, they believed the Welsh brand to be important in whatever circumstance. The number of schoolchildren accessing training courses in the last year had increased from 1 to 3 schools as a result of offering provision in Welsh. They believed this was likely to increase again.

A non-profit organisation based in a strong Welsh speaking area working with people with special needs and employing around 50 said that because they receive public money from the Assembly Government; they adhere to a bilingual policy. Despite that, the company's ethos had always been bilingual. They had obtained more work from the Local Authority because they could offer a bilingual service and were local. There was customer demand for a service in Welsh.

This and other examples underline that in areas with higher proportions of Welsh speakers, businesses who reflect the linguistic demography and/or are seen as affiliating with the locality/customers garner more local support which appear from these descriptions to serve them well in terms of increased turnover. Again this is not a new finding but it highlights the importance of geography and linguistic demography.

'Most' staff employed at a hotel based in a strong Welsh speaking area had gone to the local Welsh medium secondary school and wore 'Working Welsh' badges (a Welsh Language Board scheme that identifies Welsh speakers and services) which they believed had helped a lot. The hotel had no formal Welsh Language policy but would consider this. Because the language is part of its ethos it is reflected in the hotel's marketing strategies. The economic advantage for the hotel was seen as attraction of new business from Welsh speaking people – for weddings, meetings, conferences and funeral teas. The provision of funding for courses and training would be the additional factor to encourage the hotel to increase the use of Welsh in the business.

A marketing company serving a customer base in many parts of Wales said that the [Welsh] language was a business tool and a successful way of conveying the message. They prided themselves on language acquisition which had not been directly translated, as their strap line confirms. The fact that they were Welsh and Welsh-speaking was felt to be a unique selling point for the company. Customers come to them because they have the specialism and understanding about the local and national market in Wales.

Two companies referred to the fact that they had failed to find specialist solicitors who could provide Welsh employment contracts and felt there was a gap in the market for this.

A national medium sized service-based company with its headquarters in south Wales had undertaken an equality study by means of an internal questionnaire and established it had 3.5% bilingual staff. It had adopted a Welsh language policy primarily because it works with public bodies ('thus mandatory') and because it sees itself as a 'proud Welsh company' where the heritage of the Welsh language is important. It also distributed a questionnaire about bilingual services to clients. The company would like to improve its bilingual service and gain additional knowledge of its customer profile.

A north west Wales based estate agent was in the process of adopting a Welsh language policy because they believed it gave a good image to customers and would comply with Welsh Language Board requirements.

A company providing social care services and working with a number of Welsh local authorities was in the process of updating its Welsh language policy and was initiating a more thorough audit of customers and staff who speak Welsh. The Welsh language policy was included in induction training for staff. As a result of working in north Wales over the last two years it had become necessary to gain a comprehensive picture of customers' language profile. Consequently, having a Welsh provision had, in the respondent's view, provided an economic advantage over competitors. They felt that everyone was supportive of the Welsh language and it was seen in the organisation as something that should be represented positively. The company felt that it will have a better chance of getting more tenders in Welsh speaking areas by having a Welsh language policy. Additional factors to encourage an increasing use of Welsh included 'free publicity materials', 'more Welsh speaking people applying for jobs (not a requirement at the moment)' and a 'free translation service'.

### **Neutral use category**

A mid Wales hotel had adopted visual use of Welsh but felt there was no economic advantage, an additional burden on resources and lack of customer demand owing to its geographical location in an Anglicised part of Wales were prohibitive. Its customer base is English speaking. Their greatest motivation for considering providing more Welsh service included 'evidence of demand' and 'more information on economic advantages of bilingualism'. They felt that as things stand the commercial advantage had not been proven and therefore they were not convinced of the business benefits.

A south Wales dental surgery had a reactive and visual service provision in Welsh and it used Welsh to engender customer loyalty, identify with Wales, and as a reflection of its geographical location. Establishing customer demand would encourage increasing use of Welsh in the business.

A travel agency based in north Wales had difficulty recruiting good bilingual staff in this field – which they felt were in short supply. The owner was unclear what the advantages of providing a Welsh service were but was interested in understanding what they could be. Furthermore Government finance would be helpful, according to the company, but not with additional red tape.

This situation is reflected in previous research work where there is disparity between supply and demand. However with Welsh medium education growing to a point where almost a third of 13-15 year olds are now bilingual this will herald an emerging economically disposed generation fluent in both Welsh and English. This is not to say that there will remain recruitment problems but there is a role to play here for Careers Guidance companies, Secondary Schools and Further Education and Higher Education Colleges and Universities in terms of directing young bilinguals to vocations and sectors where their bilingual communication skills are at a premium.

A craft workshop based in a strong Welsh speaking area adopted a Welsh Language policy with the assistance of the Local Authority. Whilst they had every desire to offer services in Welsh, translation was considered to be the biggest problem due to cost and time.

### **Negative use category**

An engineering company based in a low Welsh speaking urban setting cited lack of customer demand, Welsh language not one of their skills, no economic/ marketing advantage, too expensive and shortage of confident bilingual staff stemming from the geographical location as the main reasons for not providing service in Welsh, with a lack of customer demand being one of the most important reasons.

Again this underlines a widely held view amongst many private sector businesses that there simply is no demand. It is interesting to note however that in most cases in this survey this view has not been collaborated by means of customer surveys or needs appraisals. It may also reflect the 'chicken and egg' scenario where if a business has no bilingual capacity it could not respond to any calls for service in Welsh and if this is the perception or understanding amongst customers it would be futile for them to ask and make known a desire for Welsh provision if it cannot currently be met. This widely publicised view stems in part from a lack of knowledge or information about what providing a bilingual service entails, and very little understanding about the importance of service provision in the customer's preferred language on the other. As such, a vacuum is created which can neither be corroborated nor disproven.

A mortgage service company cited the greatest motivation for considering providing a Welsh service included evidence of demand, grant support and information on economic advantages of bilingualism. Again, the evidence of demand featured most prominently.

A steel components company confirmed they had no Welsh language policy because they could work legally without it.

A fashion and beauty salon said that it all depends on customer demand and as they were on the Welsh/English border there was no demand at all. The owner had at one time embarked on a basic Welsh class. They felt that providing bilingual services would create additional costs and that there was no demand for it.

A medium sized devices company supplying an international market was registered for ISO9001<sup>6</sup> and was duly required to adopt Diversity, Equalities, Environmental, Complaints and Customer Care policies, but not a Welsh language policy.

Again this seems at odds with the modern customer care culture and belies the need to include language choice as one element of good customer care provision in Wales. Contrast this with the public sector and Central Government (Welsh Assembly Government, Welsh Local Government Association) in Wales where huge strides have been taken to ensure linguistic parity within customer care plans and equalities toolkits. This disparity therefore needs to be remedied as members of the public will not necessarily differentiate between a public or private sector provider - especially if the service is delivered by means of cross sector partnership, service level agreement or procurement.

One engineering company felt there were no additional factors that would encourage their use of Welsh in the business and went on to say that everybody speaks English. They believed that Welsh should not be imposed, and if imposed, they would rather close down the business. They felt there

<sup>6</sup> ISO9001 is a series of international quality management system standards, which derived from British Standard BS5750.

was enough red tape facing businesses as it stands, and they did not need more. Therefore they believed that if more investment were to be made in increasing the use of Welsh within the private sector this should seek to minimise additional bureaucracy and red tape.

An accountancy company based in a low Welsh speaking area on the Welsh/English border – with many clients based in England – believed that providing a service in Welsh would be expensive and unnecessary as there was no demand.

A hotel in south Wales wanted to adopt good practice so gained *Investors in People* status which included adopting Customer Care, Equalities and Environment policies (but not a Welsh language policy). Two of the greatest motivations for the business to consider providing a Welsh language service were ‘Practical advice/guidance to managers from business promotion and advisory bodies’ and ‘Language Awareness Training’.

A specialist engineering company based in a low Welsh speaking area and serving a global market had no need for a Welsh language policy/service. If they had a lot of customers who spoke Welsh then they would look again at the situation. They expressed the view that most people in their field were conversant in English.

A micro-business providing technology to public sector agencies did not provide a Welsh service because of its geographical location and lack of customer demand thus there was no perceived economic advantage; however, the company was considering opening its markets in stronger Welsh speaking areas through Local Authorities and to date did not see any commercial advantage to increasing its bilingual capacity. It was mindful nonetheless that Welsh was used more prominently in West Wales.

A north west Wales restaurant felt that accessing grants and gaining advice would encourage an increase in Welsh medium service provision.

This view is apparent to a greater extent in this and previous surveys and coincides with a more general lack of awareness about the Welsh Language Board and Mentrau Iaith Cymru’s role in

funding and encouraging the use of Welsh (Mabis 2007). That said, there is merit in considering placing greater bilingual promotional responsibilities on agencies charged with supporting start-up and current businesses – both on a national and local level.

A north west Wales hotel felt that making use of the Welsh language contributed towards creating a sense amongst visitors that they were visiting another country – it was seen as a Unique Selling Point (USP). Despite that, the business made no visual or actual use of the language.

A craft-based business in north west Wales stated it made no economic sense at all to have Welsh as part of the business as it would be more trouble than it was worth.

A large company serving a global market based in an area with a medium number of Welsh speakers stated that it would be time-consuming to provide bilingual services. There was felt to be no commercial value in working bilingually. The company has bases in a large number of countries worldwide, and felt it would be detrimental to their business.

A letting agency based in a moderate Welsh speaking area stated that it did not possess the skills, and believed that a Welsh language service was not required by its customers.

A manufacturing company located close to the English border stated that it would be time-consuming to provide bilingual services and that they were not yet convinced of the business benefits. Essentially they were driven by customer demand. Any time-consuming or costly process would need to pay off in business terms. At present they felt there was no demand for any service of this nature.

A business located in mid Wales with an international customer base said that they dealt with customers from countries all around the world, with many languages, so had to conduct business through the medium of English, the international language. They believed that there was no use using Welsh in dealing with their customer base, but might increase the bilingual service internally as three out of the twelve staff were Welsh speakers.

A dental practice based in a low Welsh speaking urban area stated that if there were legal enforcement to provide bilingual services they would need help, but to date, there had not been any such demand to implement bilingual services.

A self-catering micro-business in a strong Welsh speaking area replied to the question ‘What would be the greatest motivation for your business to consider providing a Welsh language service?’ by stating ‘Practical advice/guidance to managers from business promotion/advisory bodies’ and ‘Information on economic advantages of bilingualism’.

These findings seem to reiterate previous survey findings of the Beaufort Research study.

## 6. Recommendations

- i. **Raising awareness with standards agencies and quality centres.** One of the core arguments employed by language promotion agencies for providing more bilingual private sector services is to enshrine language choice within the principles of good customer care and quality provision. An effective way to mainstream this would be to place a duty on organisations responsible for awarding quality standards to private sector companies serving Wales to include the adoption of a Welsh Language Board approved Welsh language policy (as a section of customer care needs) as an essential component of attaining quality standards. For example *Investors in People* could specify this requirement in granting licences to Standards/Quality Centres in Wales who determine the approval (or otherwise) of the *Investors in People* standard. This should also include dealing with complaints on how Standards/ Quality Centres applied the policy in terms of bilingual provision. The practical approach to deliver this recommendation would be to define a baseline minimum bilingual provision as one standard for adoption/ compliance in accordance with the proposed Welsh language (Wales) measure 2010 enshrined in the Legislative Competency Order (LCO). This falls in line with the aim of the measure namely to ‘make provisions about standards (to eventually replace schemes) relating to the Welsh language, which may include service delivery standards, policy making standards, operational standards, promotion standards and record keeping standards. The preparation, imposition and enforcement of which to be, in the main, carried out by the Commissioner.’
  
- ii. **More research into the commercial benefits of bilingualism.** It is apparent that from some of the negative respondents to this survey the argument in support of advocating bilingualism needs to be strengthened, marketed and promoted with specific case studies or empirical research to highlight the economic advantages. This is especially relevant if businesses accessing £400,000 or more from public funds will be obliged to adopt standards of service delivery in Welsh in line with the forthcoming Welsh language measure. In addition to the ‘Welsh Advantage’ booklet type publications the Welsh Language Board (or Language Commissioner) needs to undertake more commercial based assessments into the benefits of:

- bilingual branding and marketing;
- cultural considerations and advantages;
- commercial and economic advantage/asset; and
- demand from customers (and subsequent loyalty).

This can be achieved by detailed research and case studies with companies with proven bilingual provision across the private sector – in fields such as tourism and leisure, health and social care, education, professional services etc., taking into account geographical and sectoral factors. Whilst there are varying levels of support for the language offering economic and commercial advantages to businesses (Mabis, 2007) more quantitative evidence is still required. The recommendation of Iaitb Pawb that ‘Providing services through the medium of Welsh should be seen as a way of providing distinctive and better quality services to customers’<sup>7</sup> stems from this and other research findings – most notably the Mabis focus groups conducted in 2007 – where conclusive evidence showing the actual economic benefits currently does not exist. In the current economic climate this should be a priority where finance is scarce and businesses far more reluctant to spend.

- iii. **Mainstream advice on bilingualism in business support.** The findings of this survey and others previously mentioned have highlighted the lack of understanding about bilingualism within many sectors in the private sector. Indeed this may be a contributing factor in their reluctance to embrace bilingualism in principle if not in practice. Under the banner of the Welsh Assembly Government’s ‘Flexible Support for Business’, Welsh Assembly Government appointed Relationship Managers should be provided with guidance and training on how to mainstream the promotion of bilingual practice in their dealings with private sector businesses. Again, this stems from a view which is confirmed by some of the case studies above that private sector businesses appear unsure and unclear how to consider this issue, both in terms of establishing and identifying customer linguistic needs and how best to utilise their existing bilingual skills capacity, if such exists.

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<sup>7</sup> Iaitb Pawb, Chapter 4, p 49.

- iv. **Target resources most appropriately.** With geographical location (and a presumed link to a lack of demand from customers) featuring so prominently amongst negative use category respondents, in the short to medium term it may be more productive to target private sector businesses in areas with higher proportions of Welsh speakers. Specific villages, towns and geographical areas could be targeted so that by adopting this approach a gradually increasing number of private sector businesses would create a self-fulfilling critical mass or momentum. Indeed the language could be used as an economic driver to create more (and sustain current) jobs and generate wealth by promoting buying locally thus reducing the carbon footprint and helping local producers and suppliers. A more reasoned targeted approach in the current economic climate makes practical sense and could go some way to alleviate an element of unreasonable compulsion or requirement (with the Welsh language measure) amongst certain businesses and enterprises. This is reinforced by the demographic makeup of respondents to the Stage 1 survey questionnaire and subsequent findings. Even so, with the increasing migration of young rural Welsh speakers to the urban centres of south east Wales and the growth of Welsh and bilingual education yielding increasing numbers of bilinguals, the concept of ‘Welsh speaking heartlands’ may become outdated. However in counties such as Gwynedd, Anglesey, Ceredigion and Carmarthenshire have higher densities of Welsh speakers where the language is used on a daily basis. As such it may make greater economic sense initially to target these areas as first phases for introducing language standards. This has been reflected in the public sector Welsh Language Schemes (especially Local Authorities) and by other campaigns such as Mentrau Iaith Gymraeg’s ‘Cymraeg yn Gyntaf (Welsh - give it a go)’.
- v. **Create incentives through the public sector procurement process.** The Welsh Assembly Government procurement processes should create additional incentives for private and the NFP sector to embrace and develop bilingual service provision although this cannot be achieved overnight. Therefore the message needs to be made clear to enable would-be providers to plan ahead with two languages in mind. Detailed guidance should be provided – in conjunction with the Welsh Language Unit – to ensure consistency, clarity and compliance. This recommendation stems from the finding that media and NFP sectors are leading the way in terms of bilingual service. We conclude that one reason for this is that both media and NFP organisations often provide services on behalf of or in partnerships with the public sector in

Wales, be it S4C or Local Authorities and Health Trusts where Welsh Language Scheme or legislative requirements place duties for bilingual or Welsh medium provision.

- vi. **Highlight bilingualism as part of customer care.** Due to the need to raise levels of understanding about bilingualism in the private sector all Welsh Assembly Government financed support for private sector and start-up businesses should highlight appropriately the active use of good bilingual service delivery practices as part of customer care practices in Wales. In the current economic climate these should focus on aspects of bilingual delivery which have little or no financial burden and highlight where hands on support is available – such as Local Authorities and Mentrau Iaith Gymraeg.
  
- vii. **Tie in assistance with guidance on Welsh language.** In accordance with its own Welsh Language Scheme, Welsh Assembly Government departments awarding grants and public finance should ensure that as a minimum, applicants would need to outline what bilingual service provision is proposed in line with the assistance sought. Internal guidance should be sought in conjunction with the Welsh Language Unit to ensure continuity of approach and outcomes. The Scheme refers to those areas of responsibility such as rural development, economy, leisure, tourism, etc., where this recommendation could have a direct and relevant impact. With the advent of the Welsh language measure it is important that a lead is taken in practical terms by the Welsh Assembly Government. This is one aspect where the public and private sector can work in conjunction for the benefit of members of the public in Wales.
  
- viii. **Normalise Welsh language training for employers.** This study indicates that many private sector businesses are ambivalent about Welsh or bilingual skills – this is reflected in general lack of awareness of employees (or indeed their own customers) language capacity. The emerging generation of young people from secondary education will have greater bilingual skills than their predecessors and steps should be taken to maximise and utilize these in terms of service planning and provision. One way to achieve this is to highlight and normalise Welsh language skills and language awareness training for employers, for example, through branches of the Sector Skills Councils operating in Wales. Ultimately these councils have a key role in planning and delivering skills training to different sectors in Wales – which includes the Welsh language as a skill. Likewise careers companies, through their own statutory Welsh Language

Schemes should make individuals aware of the increasing need for bilingual skills in the workplace – public, private and voluntary sectors in Wales. Some such councils may be obliged to prepare Welsh Language Schemes under the 1993 Welsh Language Act. If schemes are replaced by a set of standards, this requirement should be enshrined within one or more of these standards.

- ix. **Devise strategies that take a lead from successful sectors such as tourism and leisure.** This survey has highlighted that tourism is a leading player in terms of adopting good attitudes and practices towards the Welsh language. Vocational and sectoral training packages such as espoused in ‘A Sense of Place’ and ‘A Warm Welsh Welcome’ (stemming from the cultural tourism strategy) need to be devised, distributed, applied and monitored in other sectors. This is especially true for economic and social development programmes and community regeneration programmes in the current financial climate where language ties into supporting the local economy and ‘A Winning Wales’ – the National Economic Development Strategy with its emphasis on a Sustainable Development (and language is an aspect of SD). For many bilingual members of the public accessing services in Welsh coincides naturally with supporting local employers and employees rather than national, international or global providers - which is especially significant in the current economic climate. Again Welsh Assembly Government Departments have a leading role to play in creating awareness and support.
- x. **Provide a toolkit that enables businesses to identify linguistic makeup of their customer base.** One of the survey findings is that many businesses are unsure or unaware of their customers’ language profile. It could be argued that this leads to making inaccurate or at least untested or uninformed assumptions about customers’ language needs or preferences. This would be condoned as bad business practice if for instance it were applied to disabilities or ethnic minorities. To assist businesses in responding to customers linguistic needs a generic management toolkit to enable private sector businesses to identify and establish customer language profiles should be prepared. This would serve as a precursor for establishing a baseline for developing bilingual provision in the short to medium term amongst businesses who wish to develop their bilingual service provision capacity. This initial work could be undertaken by the Welsh Language Board’s successor responsible for promoting and

facilitating the use of Welsh in conjunction with private sector representative bodies such as CBI Cymru /Wales, FSB and other representative bodies.

**Furthermore the findings of this survey reiterate the recommendations made by Beaufort Research and Menter a Busnes (2005) namely:**

‘There is a general low level of awareness amongst the private sector in Wales as to how the Welsh language can be used to benefit their business. A promotion or communication issue therefore seems to exist, which, if addressed effectively could accelerate the process of businesses using the Welsh language to their commercial benefit.’

‘Welsh language support needs to be an integrated element of wider policy initiatives and programmed mainstream support in both the skills and economic development agendas.’

## 7. Conclusion

It is clear from the work that has been done that the use of the Welsh language has a number of features across private sector companies in Wales but two themes predominate:

- First, whether there is a (real or perceived) economic benefit has a major material impact on the use of Welsh amongst private sector businesses. As might be expected, market conditions for the private sector mean that it will only supply where there is demand and it will ruthlessly deploy this strategy in this regard. So where there is no market need for the Welsh language it will not deploy it. For many across much of Wales there is at least an assumption or perception that this necessity does not exist in earnest. What therefore needs to be produced is quantifiable empirical research and economic case studies which place the argument on a firm footing.
- Second, even where there is an economic or market advantage for a private sector company to provide a bilingual service this may, in the majority of cases, come a poor second to its main 'non-Welsh language' market; that is, in financial turnover terms the returns for using the Welsh language may be very small in relation to the overall scale of business. In turn the driver for using the language is more likely to be a combination of philanthropy and 'legal' necessity (e.g. tendering) rather than financial or sales, although a key feature of the bilingualism will be associated with branding and marketing. That being the case, empirical research would go some way to providing answers, then in the context of creating a truly bilingual Wales as enshrined in 'Iaith Pawb', the emphasis and support should be redefined towards the aim of shared cultural and linguistic values embodied within the practical notion and application of a bilingual nation.

It could be argued on the one hand that the case for the Welsh language amongst private sector businesses is not especially strong and weakens considerably towards the east of Wales. However the increasing emergence of young bilinguals across more Anglicised parts of Wales highlights that Wales's linguistic demography is changing. At the same time, private sector understanding of the potential economic and market benefits (where they exist) is not especially good – even where it is

apparent that there are advantages to providing a bilingual service. It is also apparent that companies' bilingual branding often does not coincide with the use or ability to use the Welsh language – in fact, almost invariably it does not. What this shows is that it suits some, if not many, businesses to have a close affinity with Wales and the Welsh language but not necessarily practice that affinity. This is where the element of philanthropy fits with the best use and branding of the language; many of the businesses who passionately brand and practice bilingualism espouse a sense of duty towards the language (perhaps before economic gain) and this is what sets these companies aside as language supporters. However with the increasing numbers of bilinguals there will be an increasing desire to use the language, from both employees and a customer perspective, and in that regard some parts of the private sector may be lagging in terms of linguistic knowledge and awareness. This is why this report recommends focusing on raising linguistic awareness by means of the sort of training which has been mainstreamed across the public sector in Wales, due in no small part to statutory Welsh Language Schemes. This cultural change of attitude has to a very large extent taken place in the public sector in Wales since 1995/6 with the adoption of statutory Welsh Language Schemes, and has reached a point now where no public body would intentionally deny a member of the public's right to access services in Welsh – neither in principle nor in practice. Indeed much can be learnt from the experience of the public sector in Wales over the last 10 – 15 years.

Presently the need for the Welsh language is perhaps quite rare in business; the 'legal' obligations help but do not necessarily coincide with current assumptions about use. Where the majority of 'demand' is not specific to language then it will struggle to find sufficient customer base to justify the investment – because on the one hand people and companies buy products and services, not the language; however, owing to privatisation, key services are being provided increasingly by the private sector, where communication – speaking, listening and understanding – are central to the customers' experience. The social care sector has already been mentioned, noting in particular the linguistic needs of pre-school age children, the elderly and vulnerable as drivers. The NFP sector has also taken positive steps to adopt good linguistic practices – these bodies are often delivering public services on behalf of the public sector. Training is another area where, due to public sector requirements in education or health, there is an increasing demand for delivery and qualification in Welsh or bilingually. Even in social contexts it can be seen that Welsh is being demanded by

consumers – for example with regard to search engine and social media. It is evident from the research that more could be done not just to safeguard the language but to support business development with the language; new IT platforms will provide new commercial opportunities for bilingual services.

At the same time it is perhaps futile to force the issue amongst private sector businesses if it imposes significant costs that could potentially place them at a slight economic disadvantage. More work is required to fully understand the costs and benefits of bilingual trading and the link to incentives should be more transparent. There are circa 610,000 people speaking Welsh in Wales today and these have to compete with a market of 60,000,000 mainly English speaking individuals in the UK (notwithstanding the international market) and this is the economic reality for the great majority of business in Wales.

It has to be recognised however that to a large extent the lack of Welsh language use within private sector businesses stems from two main contributing factors, namely: business attitudes which have remained unchanged and perhaps unchallenged, owing to the non compulsory nature of bilingual adoption, and lack of understanding about the very nature of bilingual delivery and of the potential benefits and collective values. Many of the above recommendations coincide with previous research findings but crucially they reinforce that if any interventions have been made since these surveys were carried out, there has been little demonstrable change in attitude, at least within this small sample, as these attitudes are still quite evident in the private sector's response to using the Welsh language.

**In the light of the recent Welsh Language measure and the obligation it is likely to place on the private sector to adopt language standards we conclude that additional research should be undertaken to establish what, if any, planning has been undertaken to utilise (and market) the use of the Welsh language amongst businesses that have some bilingual employees and what steps have businesses taken to identify and establish customers' linguistic preferences. These two focal areas are a priority in terms of establishing the commercial needs and advantages of adopting bilingual practices, and are paramount in addressing traditional attitudes and practices which exist amongst many private sector businesses in Wales.**

For instance, in retail services increasing the use of Welsh may yield greater customer loyalty – customers who are increasingly looking for a sustainable, environmental and ethical service provider. Providing the elderly with a meaningful service in Welsh within the health and social care sector will be seen as a component of good quality patient care. In the leisure and tourism sector, attractions utilising the Welsh language will serve to highlight the unique selling point of the language and culture to UK and overseas visitors.

If the recommendation to undertake more empirical research of the commercial and economic benefit of using Welsh is undertaken, what positive impact would such research have on those currently sceptical of any advantages? Therefore, allied to this would be the requirement for practical support for the private sector regarding bilingual delivery, and especially so in times of heightened economic hardship.

This report concludes by noting that Welsh language planning strategies and action plans in Wales are closely observed and heralded as good practice amongst many of those regions and nations in western Europe and north America which are equally involved in minority language revival, acquisition and survival. This is merited in terms of education and more recently in the great leap forward in the use of Welsh within the public sector. From a language perspective, the ongoing challenge is how to replicate and engender similar consensual development within the private sector.

## 8. References

**Welsh Language Board commissioned public opinion surveys:**

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**IAITH PAWB** (February 2003) A National Action Plan for a Bilingual Wales

**WELSH ASSEMBLY GOVERNMENT (2009) MEMORANDUM FROM THE CONSTITUTIONAL LAW: DEVOLUTION, WALES** - The National Assembly for Wales (Legislative Competence) (Welsh Language) Order 2009 - Draft Legislative Competence Order on the Welsh Language.

## 9. Appendix A: Stage 2 initial questionnaire

Note that this survey also was placed on line and was available in both Welsh and English to businesses. Some businesses refused to be identified even though an assurance of anonymity regarding the results for this phase was given. An incentive was offered to all businesses that provided their contact details.

Some businesses were contacted by phone towards the end of this first stage with the intention of increasing representation in key areas where the team felt that numbers were low.

## Part 1: Background (1 – 6)

1. Name of business

2. Business's geographical location (Tick one)  County (specify)  Area (for example. north Wales)  All Wales  
 Britain  Multinational  Other (please specify)

3. Specify how many staff currently work in your business (in Wales)? Number: %: Don't know:

4. Specify the number and % staff who are fluent Welsh speakers? Number: %: Don't know:

5. Specify the sector (such as tourism, leisure or retail) that best represents your business?

6. Does your business have a (tick all that apply).  Welsh language Policy  Diversity Policy  Equalities Policy  
 Environmental Policy  Customer Care Policy  Complaints Policy

## Part 2: General Use of Welsh by your Business (7 – 9)

7. Specify the number and % staff who use Welsh as a business language with customers or users? This means conducting the service in Welsh.

Number: %: Don't know:

8. Specify % customers or users who are bilingual (Welsh and English)? Number: %: Don't know:

9. Which one (or more) of the options below best describes the degree of your business's Welsh language service provision to your Customer? Tick all relevant answers.

- 1. No Welsh language provision at all – go to question 10.
- 2. Only respond to requests for service in Welsh
- 3. Visible only: (pamphlets, signs, leaflets, marketing, branding)
- 4. Interpersonal/ spoken only: (face to face, in reception or at the counter, over the phone, tannoy system)
- 5. Visible, spoken and written: Doing business with the customer in Welsh
- 6. Complete Welsh language customer service, with language included in recruiting and training processes, internal communications and policy development
- 7. Other (please specify)

**Part 3: To be completed only by businesses who DO NOT use the Welsh language with customers/service users (10 – 12)**

10. What are the factors that contribute to your business **NOT** using Welsh with customers/service users? Tick all that apply:

<input type="checkbox"/> 1. Geographical Location	<input type="checkbox"/> 10. An additional burden on limited time resource
<input type="checkbox"/> 2. Disadvantages of bilingual branding/marketing	<input type="checkbox"/> 11. No economic/marketing advantage
<input type="checkbox"/> 3. Lack of staff support	<input type="checkbox"/> 12. Lack of knowledge regarding customer language profile
<input type="checkbox"/> 4. Shortage of confident bilingual staff	<input type="checkbox"/> 13. Specialist / technical nature of our area of work
<input type="checkbox"/> 5. Lack of customer demand	<input type="checkbox"/> 14. Welsh language is not one of our skills
<input type="checkbox"/> 6. Fear of alienating customers	<input type="checkbox"/> 15. Lack of provision of Welsh in the Workplace courses
<input type="checkbox"/> 7. Conveys inaccurate image	<input type="checkbox"/> 16. Lack of knowledge of what is 'an acceptable Welsh language service'
<input type="checkbox"/> 8. Wish to avoid undue identification with Wales	<input type="checkbox"/> 17. Other (please specify)
<input type="checkbox"/> 9. Too expensive	

11. What would be the greatest motivation for your business to consider providing a Welsh language service?

<input type="checkbox"/> 1. Practical advice/guidance to managers from business promotion / advisory bodies	<input type="checkbox"/> 6. Grants to increase bilingual services
<input type="checkbox"/> 2. Free access to Welsh language training for workforce	<input type="checkbox"/> 7. Information on economic advantages of bilingualism
<input type="checkbox"/> 3. Information on local (to your business) Welsh language training providers	<input type="checkbox"/> 8. Local/within Wales purchasing campaign
<input type="checkbox"/> 4. Language Awareness Training	<input type="checkbox"/> 9. Other (please specify)
<input type="checkbox"/> 5. Evidence of demand amongst customers	

12. Considering provision of Welsh language services over the coming 5 years will your business be likely to: (Tick one only)

- Continue not to offer a Welsh language service  
 Increase the use of Welsh language service provision greatly  
 Increase the use of Welsh language service provision slightly

**Part 4: to be completed only by companies who USE Welsh with customers/ service users (13 – 14)**

13. What are the factors that contribute to your business **USING** Welsh with customers/service users? Tick all that apply:.

<input type="checkbox"/> 1. Geographical Location	<input type="checkbox"/> 10. Not an additional burden on precious time
<input type="checkbox"/> 2. Advantages of Bilingual Branding/ Marketing	<input type="checkbox"/> 11. Economic/marketing advantage
<input type="checkbox"/> 3. Supportive staff	<input type="checkbox"/> 12. High awareness of customers' language profile
<input type="checkbox"/> 4. Plentiful supply of confident bilingual staff	<input type="checkbox"/> 13. Specialist nature of our field ties in with Welsh language
<input type="checkbox"/> 5. Demand from customers	<input type="checkbox"/> 14. Welsh is a skill we possess
<input type="checkbox"/> 6. Engenders customer loyalty/support	<input type="checkbox"/> 15. Sufficient provision of Welsh courses for the workforce
<input type="checkbox"/> 7. Conveys appropriate image	<input type="checkbox"/> 16. Understand what is meant by 'appropriate Welsh language service'
<input type="checkbox"/> 8. A wish to identify with Wales	<input type="checkbox"/> 17. Other (please specify)
<input type="checkbox"/> 9. Cost-effective	

14. Considering provision of Welsh language services over the coming 5 years will your business be likely to (Tick one only)

- |  |   |
|--|---|
| <input type="checkbox"/> Decrease the Welsh language service                                 | <input type="checkbox"/> Continue using Welsh to the same degree                      |
| <input type="checkbox"/> Increase the use of Welsh language service provision slightly       | <input type="checkbox"/> Increase the use of Welsh language service provision greatly |
| <input type="checkbox"/> Not applicable - A full Welsh language service is already available |   |

## 10. Appendix B: Stage 3 in-depth questionnaire/interviews

This questionnaire was completed either through a face-to-face visit or by phone with a relevant strategic level contact within each business, for the 60 in-depth case studies. Answers from Stage 2 Initial questionnaire above were available to the researchers, where these had been completed.

Note for the Interviewer: You will be interviewing 5 businesses who currently use the Welsh language (by completing only Parts 1, 2 and 4 of the questionnaire), 5 other businesses who are eager to use Welsh in the future (by completing all Parts of the questionnaire) and 5 businesses who don't use any Welsh and are not expected to use it in the future (by completing only Parts 1, 2 and 3 of the questionnaire). All interviews will need to be recorded – with the approval of the business – and write up a note of the interview by completing every relevant Part of the final questionnaire. You will need to ensure that answers given to Part 1 of the fieldwork has also been included in the final questionnaire and reference should be made to these answers when undertaking the interview to remind and prompt discussion. Before undertaking the interview a hard copy of the original questionnaire completed by the individual business will be required. You will need to draw on this data when asking questions and follow general and specific themes. Every question under each relevant Part will need to be answered including questions that were previously answered in the on line or telephone interview.

**Part 1: Background (1 – 11)**

1. Name of business

.....

2. Business's geographical location (Tick one)

Note for the interviewer: There is some emphasis on this dimension – namely if Wales is on the business' periphery there will be less importance and profile on the Welsh language.

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> County (specify) | <input type="checkbox"/> Area (for example. north Wales) | <input type="checkbox"/> All Wales              |
| <input type="checkbox"/> Britain          | <input type="checkbox"/> Multinational                   | <input type="checkbox"/> Other (please specify) |

3. Please specify the geographical coverage of your business?

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> County (specify) | <input type="checkbox"/> Area (for example. north Wales) | <input type="checkbox"/> All Wales              |
| <input type="checkbox"/> Britain          | <input type="checkbox"/> Multinational                   | <input type="checkbox"/> Other (please specify) |

4. Specify how many staff currently work in your business (in Wales)?

Number:    %:    Don't know:

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5. Specify the number and % staff who are fluent Welsh speakers?

Number:    %:    Don't know:

6. How did you source or verify this answer? [For example, formal assessment or a self assessment form by members of staff or other] Interviewer to note below.

7. Is this a regular formalised exercise? Interviewer to note below.

8. Tick the sector (such as tourism, leisure or retail) that best represents your business?

9. Does your business have a (tick all that apply)?

Welsh language Policy  
 Environmental Policy

Diversity Policy  
 Customer Care Policy

Equalities Policy  
 Complaints Policy

10. What was the catalyst for adopting the above policies? What was (or would be) a catalyst for you to adopt a Welsh language policy? Interviewer to note below.

11. Did you undertake any market research or a business case study before considering adopting (or not adopting) a Welsh language policy? Interviewer to note below.

**Part 2: General Use of Welsh by your Business (12 – 20)**

12. Specify the number and % staff who use Welsh as a business language with customers or users? This means conducting the service in Welsh.  
Number:    %:    Don't know:

13. Is this a part of a formal business arrangement, request by customers or the actions of individual staff?

14. How did you source or verify this answer? [For example, formal assessment or a self assessment form by members of staff or other] Interviewer to note below.

15. Have you as an employer given any advice and guidance to staff on how to implement this [policy] professionally? For example, using appropriate Welsh terminology for your specific field of activity? Include customer profile details on file etc? Interviewer to note below.

16. Specify % customers or users who are bilingual (Welsh and English)?                      Number:    %:    Don't know:

17. Was information about bilingual customers gained from a formal assessment, customers informing the business when sharing personal information, that members of staff collected information from individual customers or Other (e.g. guesstimate)? Interviewer to note below.

18. What percentage of bilingual customers always or mostly use Welsh in their dealings with your business?

19. Is there an intention to formalise this in the future to gain a correct and comprehensive picture of customers' language profile? Interviewer to note below.

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20. Which one (or more) of the options below best describes the degree of your business's Welsh language service provision to your Customer? Tick all relevant answers.

Note for the interviewer: If questions 2 – 7 are answered you should enquire how the business established and provided service provision in Welsh and what were the lessons in terms of achieving this?

<input type="checkbox"/> 1. No Welsh language provision at all – go to question 21.
<input type="checkbox"/> 2. Only respond to requests for service in Welsh
<input type="checkbox"/> 3. Visible only: (pamphlets, signs, leaflets, marketing, branding)
<input type="checkbox"/> 4. Interpersonal/ spoken only: (face to face, in reception or at the counter, over the phone, tannoy system)
<input type="checkbox"/> 5. Visible, spoken and written: Doing business with the customer in Welsh
<input type="checkbox"/> 6. Complete Welsh language customer service, with language included in recruiting and training processes, internal communications and policy development
<input type="checkbox"/> 7. Other (please specify)

**Part 3: To be completed only by businesses who DO NOT use the Welsh language with customers/service users (21 – 27)**

21. What are the factors that contribute to your business **NOT** using Welsh with customers/service users? Tick all that apply:

<input type="checkbox"/> 1. Geographical Location	<input type="checkbox"/> 10. An additional burden on limited time resource
<input type="checkbox"/> 2. Disadvantages of bilingual branding/marketing	<input type="checkbox"/> 11. No economic/marketing advantage
<input type="checkbox"/> 3. Lack of staff support	<input type="checkbox"/> 12. Lack of knowledge regarding customer language profile
<input type="checkbox"/> 4. Shortage of confident bilingual staff	<input type="checkbox"/> 13. Specialist / technical nature of our area of work
<input type="checkbox"/> 5. Lack of customer demand	<input type="checkbox"/> 14. Welsh language is not one of our skills
<input type="checkbox"/> 6. Fear of alienating customers	<input type="checkbox"/> 15. Lack of provision of Welsh in the Workplace courses
<input type="checkbox"/> 7. Conveys inaccurate image	<input type="checkbox"/> 16. Lack of knowledge of what is 'an acceptable Welsh language service'
<input type="checkbox"/> 8. Wish to avoid excessive reference to Wales	<input type="checkbox"/> 17. Other (please specify)
<input type="checkbox"/> 9. Too expensive	

22. Give your answers on the basis of importance with 1 the most important and so on.

Note for the interviewer: If questions 1 – 17 are answered you need to discuss in greater depth and offer the business the opportunity to offer additional comments. That is, if Lack of staff support is given as an answer does that stem from lack of information or that the business' specific field does not appeal to Welsh speakers? Do traditional working patterns militate against changing staff attitudes towards using Welsh or are there other factors at work? If there are, what are they?

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23. What are the reasons forming your view that you do not see an economic/marketing advantage of using Welsh within your business? [For example, other business competitors not offering any provision, geographical location, lack of demand amongst customers or the impersonal nature of the business?] Interviewer to note below.

24. Have you researched this in business terms – attracting customers and additional turnover? Interviewer to note below.

25. What would be the greatest motivation for your business to consider providing a Welsh language service?

<input type="checkbox"/> 1. Practical advice/guidance to managers from business promotion / advisory bodies	<input type="checkbox"/> 6. Grants to increase bilingual services
<input type="checkbox"/> 2. Free access to Welsh language training for the workforce	<input type="checkbox"/> 7. Information on economic advantages of bilingualism
<input type="checkbox"/> 3. Information on local (to your business) Welsh language training providers	<input type="checkbox"/> 8. Local / Wales only purchasing campaign
<input type="checkbox"/> 4. Language Awareness Training	<input type="checkbox"/> 9. Other (please specify)
<input type="checkbox"/> 5. Evidence of demand for the use of Welsh amongst customers	

26. Give your answers on the basis of importance with 1 the most important and so on.

If questions 1 – 9 are answered you need to discuss in greater depth and give the business an opportunity to offer additional comments. That is, if gaining free access to Welsh language training for the workforce is given as an answer what is the Welsh training requirements in terms of content and type of course. Another would be Information about economic advantages of bilingualism, exactly what type of information – opinion survey results or evidence of the economic advantage within the business or sector, and through which medium – flyer, booklet, presentation in a seminar.

27. Considering provision of Welsh language services over the coming 5 years will your business be likely to: (Tick one only)

- Continue not to offer a Welsh language service
  Increase the use of Welsh language service provision slightly  
 Increase the use of Welsh language service provision significantly

28. What additional factors would encourage you to increase the use of Welsh in your business? For example, Government finance, practical on site assistance, free publicity materials etc? Interviewer to note below.

**Part 4: to be completed only by companies who USE Welsh with customers/ service users (29 – 34)**

29. What are the factors that contribute to your business **USING** Welsh with customers/service users? Tick all that apply:

<input type="checkbox"/> 1. Geographical Location	<input type="checkbox"/> 10. Not an additional burden on time / resources
<input type="checkbox"/> 2. Advantages of Bilingual Branding/ Marketing	<input type="checkbox"/> 11. Economic/marketing advantage
<input type="checkbox"/> 3. Supportive staff	<input type="checkbox"/> 12. High awareness of customers' language profile
<input type="checkbox"/> 4. Plentiful supply of confident bilingual staff	<input type="checkbox"/> 13. Specialist nature of our field ties in with using the Welsh language
<input type="checkbox"/> 5. Demand from customers	<input type="checkbox"/> 14. Welsh is a skill we possess
<input type="checkbox"/> 6. Engenders customer loyalty/support	<input type="checkbox"/> 15. Sufficient provision of Welsh courses for the workforce
<input type="checkbox"/> 7. Conveys appropriate image	<input type="checkbox"/> 16. Understand what is meant by 'appropriate Welsh language service'
<input type="checkbox"/> 8. A wish to identify with Wales	<input type="checkbox"/> 17. Other (please specify)
<input type="checkbox"/> 9. Cost-effective	

30. Give your answers on the basis of importance with 1 the most important and so on.

If questions 1 – 17 are answered you need to discuss in greater depth and give the business an opportunity to offer additional comments. That is, if Supportive Staff is given as an answer does this stem from a high information level that the business' specific field appeals to Welsh speakers? Does tradition reinforce staff attitudes or are they supportive of the Welsh language? Does the business managers have a vision or has the bilingual provision develop organically/spontaneously over time?

31. In your business what exactly is the nature of the economic/ marketing advantage of using Welsh? For example, is there a public expectation for service in Welsh, do you wish to attract Welsh speaking customers specifically, does the nature of your business place an emphasis on communicating with customers? Interviewer to note below.

32. Have you evaluated the economic/ marketing advantage in business terms – for example leading to additional customers, additional profit turnover or an increase in customer loyalty? Interviewer to note below.

33. Considering provision of Welsh language services over the coming 5 years will your business be likely to (Tick one only)

- Decrease the Welsh language service
  - Increase the use of Welsh language service provision slightly
  - Not applicable - A full Welsh language service is already available
  - Continue using Welsh to the same degree
  - Increase the use of Welsh language service provision significantly
- 

34. What additional factors would encourage you to increase the use of Welsh in your business? For example, Government finance, practical on site assistance, free publicity materials etc? Interviewer to note below.



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