

English by default

Understanding the use and non-use
of Welsh language services



About Citizens Advice Cymru

Citizens Advice is an independent charity covering England and Wales operating as Citizens Advice Cymru in Wales with offices in Cardiff and Rhyl. There are 20 member Citizen Advice Bureaux in Wales, all of whom are members of Citizens Advice Cymru, delivering services from over 375 locations.

The twin aims of the Citizens Advice service are:

- to provide the advice people need for the problems they face
- to improve the policies and practices that affect people's lives.

The advice provided by the Citizens Advice service is free, independent, confidential and impartial, and available to everyone regardless of race, gender, disability, sexual orientation, religion, age or nationality.

The majority of Citizens Advice services staff are trained volunteers. All advice staff, whether paid or volunteer, are trained in advice giving skills and have regular updates on topic-specific training and access to topic-based specialist support.

Local Bureaux, under the terms of membership of Citizens Advice, provide core advice based on a certificate of quality standards on welfare benefits/tax credits, debt, housing, financial products and services, consumer issues, employment, health, immigration and asylum, legal issues, and relationships and family matters.

The Citizens Advice Service now has responsibilities for consumer representation in Wales as a result of the UK Government's changes to the consumer landscape¹. On 1st April 2014 Consumer Futures became part of the Citizens Advice Service. Citizens Advice inherited the remit, statutory duties, powers, research expertise, corporate memory and experience of Consumer Futures which, aligned with Citizens Advice's own skills, knowledge and community connections created a single, powerful, evidence-driven champion for citizens. We seek to gather evidence and expert analysis to support strong arguments for putting the needs of consumers at the heart of policy-making and market behaviour.

The work that informs this report, including evidence gathering and research commenced during 2013/14 by Consumer Futures and has been completed thereafter by the Citizens Advice Service.

¹ On 1st April 2013 responsibility for consumer representation was transferred from Consumer Focus to the Citizens Advice Service (including Citizens Advice Cymru) following the UK Government's review of the consumer landscape.

Acknowledgements

Citizens Advice Cymru would like to thank the Welsh speakers who participated in our research. The insight they have provided has been extremely valuable in helping to better understand what influences how Welsh speakers use Welsh language services, their experiences of these services and what they want from them in the future.

Thank you to Huw Gapper who started this work whilst on secondment at Consumer Futures. Huw was responsible for shaping and commissioning the consumer research element of this project, gathering evidence and undertaking a review of service providers Welsh language services. The handover that you provided to Citizens Advice Cymru shaped this report and in hand with the findings of the commissioned research we received back, directly inform our views and recommendations.

Thank you also to Nia and Osian at Nico who worked on analysing all the evidence sources and in the main, drafted this report.

Also thank you to Beaufort Research, who were commissioned to undertake the consumer research element of the evidence gathering.

Finally we would like to extend our thanks to the stakeholders who responded to our request for evidence to inform this project. The evidence you provided, both written and in some cases through telephone and face to face discussions has been very useful in informing our work.

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Executive Summary

This report examines the experiences of Welsh speakers in using Welsh language services in Wales and their views of, and attitudes to service provision. It is based on bespoke quantitative and qualitative research commissioned by Consumer Futures Wales as well as a review of Welsh language telephone and website services offered by service providers. Evidence was also gathered from the perspective of service providers. Citizens Advice Cymru has since taken on responsibility for this work as part of our role to represent consumers in Wales².

The research with Welsh speakers examines what fluent Welsh speaking consumers want from Welsh language services, how they want to use them and what, for them, makes a good Welsh language service. As part of the qualitative research, alongside the review of how Welsh language telephone and website services are delivered, we explored access to service provision through the medium of Welsh. The aim was to better understand how services are currently provided, how provision may impact on usage and how this provision aligns with how consumers choose to use services.

This work has been undertaken in the context of the introduction of the Welsh Language Measure (Wales) 2011 (“the Measure”) which establishes Welsh as an official language in Wales and provides a new statutory framework for the development of services in Welsh, including duties in the form of standards to be imposed on a wide range of public, private and voluntary bodies and a Welsh Language Commissioner to regulate compliance with these duties. The two underlying principles to the delivery of services in accordance with standards are that:

- The Welsh language should be treated no less favourably than the English language, and;
- Persons in Wales should be able to live their lives through the medium of the Welsh language if they choose to do so

The Measure specifies that standards may be imposed upon providers of gas services, electricity services, post offices and postal services, as well as other companies subject to regulation. It also specifies that duties can only be imposed on those sectors in relation to service delivery and record keeping standards, with the exception of Royal Mail who will be subject to 4 types of standards. The service provision activities outlined in the Measure that must be provided in Welsh include correspondence, telephone calls, publications, websites and online services.

With this in mind, along with our statutory responsibilities to represent energy and post consumers and our wider consumer role, this research focuses on service providers, who are likely to be subject to the Measure, particularly those within the private sector. Specifically banks, gas, electricity, phone, television and broadband suppliers and postal providers.

² On 1st April 2013 responsibility for consumer representation was transferred from Consumer Focus to the Citizens Advice Service (including Citizens Advice Cymru) following the UK Government’s review of the consumer landscape

Although we do also include consideration of health services and local authorities as part of our research and in our review of service providers, in order to be able to provide a perspective on public sector Welsh language services.

The issue of providing Welsh language services is a complex one and we recognise it can be challenging for service providers who can argue, and some did so as part of our research, that take up of existing Welsh language services is low. This can lead to the suggestion that Welsh speakers do not need or want Welsh specific service provision and for service providers to question the amount of resources that they spend on such provision, the need to invest in further Welsh language services, or to invest in them at all. One provider told us:

'.....consistently low uptake by consumers of Welsh services already on offer...does not positively contribute to consideration of investment in further service development'.

It may be the case that these concerns are particularly prevalent at a time where public authorities and some voluntary sector organisations are starting have new responsibilities placed on them under the new Welsh Language Standards and other service providers, including businesses subject to economic regulation, are starting to consider how the Measure and any resulting Welsh Language Standards will affect them.

For these very reasons, we specifically try and unpick why take up of some Welsh language services (where these exist) may be low and in the context of requirements to make Welsh specific provision available, we suggest how service providers should use our findings and recommendations to fundamentally review and reform how they design, deliver and monitor provision of Welsh language services. We also hope that for service providers who as a result of the Measure will be considering this issue for the first time, this report provides a timely analysis and practical steps as to how to provide Welsh language services that meet the needs of those who wish to use them.

Why provide a Welsh language service?

We know that this can be a sensitive and complex area. For those service providers who will be subject to the Measure, this will not be up for debate. The issue is more about the level of provision that is made available, the method of delivery and the resources service providers allocate to changing and improving current services. It is also about how they undertake what we would argue to be key activities such as monitoring and review of, as well as promotion of, Welsh language services.

The desire amongst some Welsh speakers for Welsh language services is clear. Research conducted over the past two decades has found this consistently and this desire is increasing³. Having the option to use services through the medium of Welsh is not just about a preference. We also know that many Welsh speakers feel more comfortable expressing themselves in Welsh, feel more confident communicating their needs in Welsh, think and live their lives in Welsh. It can be argued therefore that when services are not available in Welsh; this is a failure to meet a basic requirement. This is especially the case in some service contexts or where consumers are vulnerable. Feeling able to express yourself and being comfortable and confident in communicating with a service provider is vital. In fact our research reiterates this as people told us they want to deal with suppliers through the medium of Welsh because it is their first language, also because they feel more confident and comfortable in Welsh or they find it easier in Welsh. It can therefore be argued that taking a 'rights based approach' to the consideration of why provision of a Welsh language service is important, can be helpful.

Taking a rights based approach also makes good business sense. Our research shows that Welsh speaking consumers value companies that make provision in Welsh. Valued customers make for loyal and satisfied customers. Agreement was high amongst participants in our research that there are positive commercial effects in terms of attracting and retaining Welsh speaking customers:

- 94 per cent of fluent Welsh speakers interviewed felt that having a good Welsh language service helps a company stand out
- 90 per cent of those interviewed felt that being able to deal with organisations in Welsh makes them feel valued as a customer
- 83 per cent say that they are more inclined to stay with a company that provides a good Welsh language service
- 82 per cent say that they are more inclined to choose a company that provides a good Welsh language service

Despite this 80 per cent of fluent Welsh speakers felt that service providers such as those we focused on in our research don't do enough to cater for the needs of Welsh speaking customers at the moment.

Barriers to using Welsh language services

We found a complex mix of reasons which we believe impact on people's use of existing Welsh language services. We would argue there are structural barriers in the way organisations design, deliver and promote their Welsh language services, often meaning that these services can be more difficult to access and less visible than English language provision. However there are also

3 The Welsh Social Survey of 1992 found that 63-64% of fluent Welsh speakers would use services in Welsh if available. More recently, a survey conducted by Consumer Focus Wales in 2010 found 80% of respondents agreed or strongly agreed Welsh speakers should have the right to access all services in Welsh.

behavioural barriers, in the way Welsh speakers use and view their Welsh, their perceptions of Welsh language services, and their past experiences of using Welsh language services that impact on why they use or do not use existing services. Importantly, both structural and behavioural barriers often exist together and influence one another.

We recognise this presents complex and significant challenges to service providers however, in our report we seek to unravel these complexities.

Citizens Advice Cymru believes that to better understand why Welsh speakers' take up of some Welsh language services is low, Welsh speakers must first be considered as consumers of services e.g. a varied group of people who have different needs and preferences for accessing services depending on the market they are engaging with and the issue that they have. Also that fundamentally Welsh speakers, who would prefer to use Welsh language services, like any other consumers, wish to be able to quickly and easily access information to use a service, pay a bill and find information that is clear and easy to understand. They want good customer service, to be made to feel valued and feel as if the company has built a service that delivers for them. Some Welsh speakers have told us they want to do these things in Welsh. Our research shows that 40 per cent of fluent Welsh speakers would prefer to use Welsh when dealing with their bank or building society, whilst 45 per cent of fluent Welsh speakers would prefer to interact with gas, electricity, phone, television or broadband suppliers in Welsh.

Lack of access, visibility and availability of provision

We found that these elements are key barriers to lack of Welsh usage. When we asked fluent Welsh speakers why they did not use or always use Welsh in their dealings with service providers⁴, not having the option or choice to use Welsh was the main spontaneous reason given (31 per cent for banks and building societies and 44 per cent for gas, electricity, phone, television and broadband suppliers), followed by not always having the opportunity to do so, together with uncertainty about whether there is a Welsh language service available. Our evidence found that a lack of awareness of a Welsh language service or the absence of a service are more significant barriers to using Welsh than a consumer's preference for using English.

Customers in any market expect to be able to access services quickly and easily and have clear routes to seek the information or service they need. However, our research shows that Welsh speakers have very mixed experiences when trying to access services. Over a third of the telephone helplines we reviewed provide a clear choice of service in Welsh, however 45% of the telephone services we looked at, do not provide a Welsh language service at all. Websites fared particularly poorly, with only 14% of the websites we reviewed providing a clear choice of service in Welsh. Half of the websites we analysed required Welsh speakers to actively seek a Welsh version of the site, whilst 29% did not offer a Welsh option at all.

⁴ Banks and building societies and also gas, electricity, phone, television and broadband suppliers

Consideration of consumer behaviour is also key here, as we know from our focus group research and from how consumers behave more broadly that the longer someone finds trying to use a service or the more difficult it is to access, the less likely they are to use it.

Quality and consistency of provision

Consumers value good quality services and this impacts on the choices they make about the services they choose to use. This coupled with the fact that we know many Welsh speakers want to be able to use services in Welsh⁵, means that being able to provide a good experience through the medium of Welsh for customers is a real advantage for service providers. Despite this, 38 per cent of fluent Welsh speakers rate the current quality of Welsh language services provided by banks, gas, electricity and phone, television and broadband providers generally as 'poor' or 'very poor'. Younger Welsh speakers interestingly were less likely to give a positive rating. Where people were usually accessing services online, ratings were least positive.

Interestingly fluent Welsh speakers living outside Welsh language heartland areas are most likely to rate the Welsh language services provided by such organisations as worse than those provided in English, particularly amongst those living in South East Wales.

Telecoms companies and energy suppliers are more likely than the other specific types of service providers asked about to be rated as having poor Welsh language services by fluent Welsh speakers, with 58 per cent of those interviewed rating telecoms companies as 'poor' or 'very poor' for instance. This was the case for 41 per cent of those interviewed when it came to energy suppliers (with only 22 per cent of people rating them 'good' or 'very good').

We found that whilst there is an appetite for Welsh language services, this is arguably not being met by current provision. Providing an inadequate⁶ or inconsistent offer of provision can actually lead to a lack of confidence and trust in Welsh language services, which in itself creates a barrier to their use.

As with other types of consumers, Welsh speakers use Welsh language services in different ways depending on the situation and type of consumer, however their experiences varied not only between providers but also between methods of communication (sometimes with the same provider).

40 per cent of fluent Welsh speakers interviewed told us they would prefer to use Welsh when contacting their bank or building society, however only 20 per cent of people are currently always doing so. This varies by contact method but the biggest gap is in the area of

⁵ See footnote 3

⁶ As highlighted by our review of Welsh language services

online services, where 32 per cent of Welsh speakers told us that they would prefer to use Welsh to deal with their bank or building society via a website or app, but only 4 per cent of people are currently always doing so.

However our research found that despite these disparities within the banking market, Welsh speakers' language preference is currently much less likely to be satisfied by gas, electricity, phone, television or broadband suppliers. 45 per cent of people who have contact with these providers would prefer to deal with them in Welsh, but just 6 per cent are always doing so currently. Again this varies across channels, with online being the form of contact where use of Welsh is lowest. However the highest demand for Welsh services in dealing with such providers is via telephone contact, where 48 per cent of Welsh speakers would like to use Welsh but only 7 per cent of people are currently always using Welsh

The role of consumer behaviour

We have already highlighted above, that the reasons why Welsh speakers are not always choosing to use Welsh language services are complex. We have argued that the way Welsh language services are currently designed and delivered do not necessarily meet the needs of Welsh speaking consumers. However we have also highlighted that the way provision currently exists could actually be interacting with the behavioural choices that people make to negatively impact on people's use of Welsh services.

We believe that consumer behaviour plays a key role here - both in terms of the influence of defaults and consumer habits. When we asked fluent Welsh speakers why they didn't use or always use Welsh language services they also told us that they use English out of habit; they lack confidence and have a fear of mistakes or misunderstandings when dealing in Welsh; and that they have concerns over encountering difficult language, technical terminology or unfamiliar words in Welsh. We believe the principles of behavioural economics⁷ are useful in understanding what this means in practice. For instance around defaults, as humans, if an option is pre-selected for us, we are influenced significantly by this default option. Welsh language services are often 'opt in'. By designing services in this way, we arguably discourage the use of Welsh. Our own research emphasises this with half of the websites we analysed requiring Welsh speakers to actively seek a Welsh version (whilst 29% gave no option to view content in Welsh at all). We believe this is likely therefore to be influencing Welsh speakers to use services in English.

⁷ Behavioural economics is an approach that seeks to consider how people's behaviour impacts on the choices that they make. It highlights two principles which, when considered alongside the research available on the use of Welsh language services, may be useful in explaining the use and non-use of services in Welsh – the influence of defaults and consumer habits.

We believe the lack of visibility of a Welsh option or a telephone response with no indication of a language choice can combine with the habit of using English more than Welsh with service providers, and online generally, to form a significant barrier to using Welsh.

As we highlight in our report therefore, it is important for service providers to consider how the delivery and design of services can be adjusted or designed in such a way as to present a true choice for Welsh speakers, encouraging take up of services that best meet their needs.

As indicated earlier, confidence is also key to Welsh speakers' decisions about using Welsh services, with some people who took part in our research telling us they were concerned about the Welsh language used online for instance and the formality of this. Previous experience and low expectations of service quality also add to habits in service use.

What makes a good Welsh language service?

Having identified the barriers to the use of Welsh language services amongst fluent Welsh speakers, finally we consider what the key aspects of a service in Welsh are. The most important considerations for such Welsh speakers are:

The service available in Welsh being as good as in English generally (rated 'very important' by 79 per cent of fluent Welsh speakers interviewed). This included:

- Having easy to find contact details
- Not having too many automated steps before speaking to people
- Not having to wait too long for the phone to be answered
- Speaking to someone who is able to answer your query
- Consistency of provision across different channels e.g. between the telephone and website

Welsh language options being promoted clearly upfront when you make contact (rated 'very important' by 77 per cent of those interviewed). 93 per cent of fluent Welsh speakers agreed that they were more likely to use a Welsh language service if they were offered this upfront. For instance:

- By phone, consumers should be offered the option from the start to continue in Welsh
- More use of badges, signage or 'start every conversation in Welsh signs'
- Where a dedicated helpline is available, care should be taken to ensure this is visible and easy to access and can be viewed as an active equal offer alongside English in the consumer journey
- Providing a bilingual splash page
- Ensuring any Cymraeg button on a website is clear and visible at first sight to consumers as part of a standard consumer journey e.g. visible as soon as you click on the page, at the top of the page

The use of clear, easy to understand Welsh on websites (rated 'very important' by 75 percent of fluent Welsh speakers interviewed)

- Any Welsh customer facing communications need to be clear and easy to understand (79 per cent of fluent Welsh speakers agree that if the Welsh is too formal or technical, 'it puts me off dealing in Welsh').
- Providing hyperlinks to translate words or a function which translates individual words when the mouse hovers over this
- Live chat through the medium of Welsh available alongside the English language option
- Using consumers to test the language used on websites

Summary

As noted earlier, many of the aspects that fluent Welsh speakers felt represented a good Welsh language service are consistent with what consumers more broadly would expect from a good quality service. We believe that:

- service providers should do more to think about Welsh language provision from the basis of a customer's journey and how they use services.
- it is vital that providers involve Welsh speaking users (or potential users) in reviewing current services, designing future services and also importantly ongoing testing and monitoring of Welsh language provision to highlight and help address issues with provision.

By building provision around how consumers use and navigate a provider's services, at the same time taking into account consumer behaviour and the associated barriers to access we have identified in this report, we would argue that providers will go a long way to meeting their obligations under the Measure. Importantly they will also stand a strong chance of not only increasing take up of Welsh language services (where these are currently offered and are underused) but also of building stronger customer relationships which will pay dividends in customer satisfaction.

Finally this is not just a one off exercise, as with all consumer engagement and relationship management, service providers should have measures in place to monitor, review and regularly change provision based on customer engagement.

Recommendations

These recommendations are in direct response to the research outlined in this report into the expectations, aspirations and needs of Welsh speakers in their interactions with service providers. However, they also serve to assist the preparedness of those companies and service providers who will be subject to Welsh language standards in accordance with the Welsh Language (Wales) Measure 2011.

Welsh as an official language

Service providers should:

- Adopt the principle that customers in Wales can interact with them in Welsh if they so wish, in light of the Welsh Language (Wales) Measure 2011 and the official status of the Welsh language.

Engagement

Service providers should:

- Actively seek to understand the needs of Welsh speaking consumers specifically by engaging, consulting and involving consumers and representative bodies in the design and delivery of their services.
- Adopt a Welsh language consumer engagement strategy to ensure their Welsh language services are designed and delivered in a smarter more efficient way, increasing uptake and service user satisfaction.
- Consider how they can involve Welsh speakers in their co-production or Corporate Social responsibility (CSR) strategies in a rights-based approach, ensuring Welsh speakers are provided with services that best meet their needs.

Active offer

Service providers should

ensure that any potential barriers to using Welsh language services as outlined in the report are identified and mitigated by:

- Making sure Welsh language services are clearly visible, easily accessible, actively promoted and consistently available.
- Developing further their bilingual corporate identity in Wales, and ensuring any website and public facing offices signpost Welsh language services clearly. This includes making the Cymraeg option prominent.
- Giving consumers in Wales an active offer of using Welsh or English. English should not be the default language.
- Providing some services with the Welsh language as the default language to promote their uptake.
- Using jargon-free and user friendly language that has been proof read to ensure accuracy.

Service providers should:

- explore ways that the use of IT can facilitate an active offer, for example using cookies to remember a language preference, IP address identification to determine geographic location etc.

Advice and good practice

The Welsh Government and the Welsh Language Commissioner should consider:

- The need for service provider guidelines on delivering Welsh language services in terms of the content, design and presentation of information e.g. Codes of Practice linked to the Welsh language standards. This guidance should be regularly reviewed.
- The development of a central resource giving guidance on providing Welsh language services, including case studies and examples of good practice. This development could be sponsored, hosted or facilitated by a cross-section of interested parties including the National Advice Network.

Strategy

Service providers should:

- Identify the principles of what would make a good Welsh language service for their organisation as a basis for a proactive strategy to improve and increase uptake by consumers.
- Establish the Welsh language skills of staff, with a view to capitalising on existing skills, building staff confidence and adding to Welsh language capacity through recruitment and training.
- Incorporate Welsh Language Awareness Training as part of staff induction training so that staff (both Welsh speaking and non-Welsh speaking) are able to deal sensitively and knowledgeably with Welsh speaking service users.
- Include the Welsh language in any accessibility policies or statements, acknowledging that linguistic barriers exist for some, so that those Welsh speakers who are disadvantaged by not being able to receive a Welsh language service are provided with an appropriate service in accordance with their needs.

Introduction

There is widespread support amongst the public in Wales for the safeguarding and promotion of the Welsh language as an essential and valuable element of modern Wales⁸. Naturally, there are many aspects to securing the future of the language but recent Welsh Government policy and legislation highlights that the use of services by the public through the medium of Welsh has a significant role to play in the future vitality of the language.

Our report looks at fluent Welsh speaking consumers' experience of existing Welsh language services, their views on the accessibility of those services and how they would like to see Welsh language services delivered in future. We set out our research alongside the perspective of service providers which, in turn, is set against a background of new Welsh language legislation that will impact on a range of sectors from 2014 onwards.

The Welsh Language Measure (Wales) 2011 provides a new statutory framework for the introduction of standards relating to the delivery of services to the public in Wales through the medium of Welsh. The intention is to ensure wider provision for consumers across sectors, together with more clarity and consistency in accessing Welsh language services. While the requirements will also provide greater clarity for providers in terms of their statutory responsibilities to Welsh speakers, some standards may provide a new challenge particularly for those providers who do not currently offer a comprehensive set of Welsh language services. We believe the new requirements are also an opportunity for service providers to review their current provision and consider where changes could be made to better meet the needs of Welsh speakers and increase uptake of Welsh language services. With this in mind, our report highlights what fluent Welsh speaking consumers want from Welsh language services, how they want to use them and what for them makes a good Welsh language service. We also outline the barriers to accessing Welsh language service and practical ways to address these.

Citizens Advice Cymru also believes that service providers should seek to offer inclusive services which, as far as possible, meet the needs of different groups of consumers, especially vulnerable and hard to reach individuals and groups. This, together with our belief that consumers' needs should be a key driver in the design and delivery of services, leads us to examine whether Welsh speaking service users are being offered services in ways that adequately meet their needs. In gaining an insight into Welsh speaking consumer experience, service providers will be better informed in terms of service design and delivery that is best suited for their Welsh speaking customers and also in terms of the potential benefits that this may lead to, such as cost effectiveness and improved customer satisfaction.

⁸ For instance, in a survey carried out on behalf of the Welsh Language Board in 2008, almost 75 per cent of respondents saw the language as 'something belonging to everyone in Wales'

According to the 2011 census figures, 562,000 people or 19% of the population of Wales are able to speak Welsh. Inclusive services in Wales therefore should mean services that provide for the needs, and satisfy the preferences of Welsh speakers.

Research conducted over the past two decades has consistently found a clear and increasingly articulated desire for Welsh language services amongst Welsh speakers. The Welsh Social Survey of 1992 found that 63-64% of fluent Welsh speakers would use services in Welsh if available, and more recently, a survey conducted by Consumer Focus Wales in 2010 found 80% of Welsh speakers agreed or strongly agreed Welsh speakers should have the right to access all services in Welsh. More generally, research recently conducted on behalf of the Welsh Government, the BBC and S4C has found that 84% of Welsh speakers would welcome more opportunities to use Welsh. Whilst this desire for services in Welsh is clear, current provision and the way that provision is designed and delivered with Welsh speakers in mind, appears inconsistent and patchy.

In some service contexts, especially where service users are more vulnerable, the quality of a service can be conditional to a large extent on the language in which it is provided. For service users who feel more comfortable expressing themselves in Welsh, who feel more confident communicating their needs in Welsh, who think in Welsh and live in Welsh, a service which is not available in Welsh fails to meet a basic requirement. This has been widely acknowledged in recent times, for example, by the health and social care sector in Wales:

“It is important for people working in health, social services and social care to recognise that many people can only communicate their care needs effectively through the medium of Welsh⁹.”

Failure to offer services in Welsh can also lead to frustration. At times, Welsh speakers have to complain before receiving a service in their own language. Often, some Welsh language services are available but they are less visible than the English versions and so the fact that Welsh speakers often have to actively seek a Welsh language service highlights how more vulnerable service users are put at a distinct disadvantage to the point of being excluded from the exact service provision that would best suit their needs. These types of barriers are key when seeking to understand consumer behaviour in respect of the Welsh language in general.

Despite the clear desire amongst some Welsh speakers to use services in Welsh and the problems and frustrations sometimes caused by a lack of a service in Welsh, the extent to which providers deliver services in Welsh remains varied. Much of the public sector delivers services in Welsh, to varying degrees, in accordance with statutory duties, whilst some

9 'More than Just Words' – Strategic Framework for Welsh Language Services in Health, Social Services and Social Care (Welsh Government 2012 – p6)

voluntary and private sector organisations choose to provide some or all of their services in Welsh. Equally, many providers offer no services at all in Welsh.

Past research has found that where services are available in Welsh, there is a disparity between Welsh speakers' stated wish to access these services and reported usage¹⁰. Some service providers have therefore questioned the need to invest in further Welsh language services, or to invest in them at all, on the basis of low levels of take-up of the services they currently provide in Welsh. We will seek to explore these issues, looking at some of the reasons why there may be a disparity between what Welsh speakers say they would like and usage, taking into account both consumer behaviour and the way in which Welsh language services are currently provided, both of which, it may be argued, play a part in explaining this complex issue.

One of the key elements of successful service provision is consumer engagement and we believe that service users should have a say in the provision of services in Welsh. This reflects current thinking on the future design of public services:

"It is self-evident that the basic purpose of any public service organisation is to serve the public. To do so, it needs a full and intimate understanding of the needs, priorities and preferences of citizens and communities... Without effective public engagement there can be no effective governance, and no consistent service improvement."¹¹

Shaping the design of Welsh language services in this way would ensure that they meet the needs of their intended users, thereby encouraging their use, and would also help to ensure that Welsh speaking users are not disadvantaged and left frustrated by a lack of access to services in their own language. We will therefore also consider how consumers currently are, and could be in future, involved in shaping services.

This report is based on research undertaken with fluent Welsh speakers as well as evidence gathered from the perspective of service providers. The organisations engaged in this research cover a number of sectors, both private and public: transport, energy, water, communications and postal services, together with local authorities, NHS bodies, education, emergency services, Welsh Government and central government.

The evidence gathered informs our recommendations for improvements to Welsh language services both in the short and longer term. We hope it will provide practical insight to assist providers in establishing strong foundations for the way in which Welsh language services are planned, designed, delivered and reviewed in future. This in turn will facilitate the process of meeting statutory duties to provide services in Welsh introduced from 2014 onwards,

¹⁰ Gwasaniaithau: Consumers and the Welsh language. Consumer Focus Wales (2010)

¹¹ 'Commission on Public Service Governance and Delivery' - 2014 (S4.30)

in accordance with the Welsh Language Measure (Wales) 2011. This report also seeks to influence the Welsh Language Commissioner and Welsh Government in respect of the clarity needed regarding the standards to be imposed on service providers, highlighting the need for clear guidance in any accompanying codes of practice. Citizens Advice Cymru believes that it is key to explain not just which Welsh language services are to be provided but also how they should be provided.

We do not seek to address all issues relating to the provision and use of Welsh language services. Rather our aim is to identify some ways in which the needs and preferences of Welsh speakers could be better satisfied by providers of services in Wales, thus achieving improvements for consumers and ensuring that providers are better placed to meet any new legislative requirements.

The legislative and policy context

In terms of the use of the Welsh language in public services, it is no exaggeration to say that the language was systematically marginalised within official spheres for over 500 years. As a result, the provision of services to the public in Wales has been predominantly through the medium of English until quite recently, with the introduction of legislation and policy interventions focusing on the Welsh language to seek to preserve and extend the use of Welsh. The views, habits and expectations of Welsh speakers in their use of services and many areas of society more broadly must therefore be considered in the context of the dominance of English as an official language.

UNESCO reports that 43% of the estimated 6000 languages in the world are now endangered, including Welsh¹². In order to preserve lesser spoken languages and protect the rights of speakers of such languages, measures have been developed and implemented to protect and promote them. Internationally, for example, in 1992 the UN included relevant measures within its declaration on 'the Rights of Persons Belonging to National or Ethnic, Religious or Linguistic Minorities'¹³. On a European level member states are encouraged to ratify the various measures within the 'European Charter for Regional or Minority languages'¹⁴ and some language rights are enshrined within the European Convention on Human Rights¹⁵.

Domestically, prior to devolution, the UK Government introduced legislation and policy aimed at increasing the status and use of Welsh. Acts were passed in 1942¹⁶ and 1967¹⁷ to allow for the use of the Welsh language within legal proceedings. More significantly, the Welsh Language Act 1993 established the principle that the Welsh and English languages should be treated on a basis of equality within the administration of justice and public business in Wales¹⁸. In accordance with this Act, around 600 Welsh Language Schemes have been drawn up, mostly by public bodies, which have led to a significant increase in the availability of public services in Welsh.

More recently the Welsh Government has introduced two strategies aimed at increasing the use of the Welsh language. The first, 'Iaith Pawb' was published in 2003. One of its key aims was ensuring 'more services, by public, private and voluntary organisations are able to be delivered through the medium of Welsh'¹⁹, mainly through monitoring the implementation of the Welsh Language Act 1993. The current strategy, published in 2012, 'A living language: A language for living²⁰', has six clear aims including the vision to improve Welsh language services for citizens.

12 <http://www.unesco.org/culture/languages-atlas/index.php>

13 <http://www.un-documents.net/a47r135.htm>

14 <http://conventions.coe.int/Treaty/en/Treaties/Html/148.htm>

15 <http://human-rights-convention.org/>

16 <http://www.legislation.gov.uk/ukpga/Geo6/5-6/40/enacted?text=language>

17 <http://www.legislation.gov.uk/ukpga/1967/66/contents/enacted>

18 <http://www.legislation.gov.uk/ukpga/1993/38/contents>

19 <http://wales.gov.uk/depc/publications/welshlanguage/iaithpawb/iaithpawbe.pdf?lang=en> (p47)

20 <http://wales.gov.uk/topics/welshlanguage/publications/wlstrategy2012/?lang=en>

In a 2014 policy statement building on this current strategy 'A living language: a language for living – Moving forward'²¹ the Welsh Government sets out in more detail how it intends to take the strategy forward for the next three years. In the context of service provision it notes:

'Much emphasis over recent years has been placed on building the capacity of service delivery through the medium of Welsh, whether in the public, private or third sectors. This is to be applauded. There is a growing requirement, however, to ensure that our efforts to provide Welsh language services are matched by our efforts encouraging the use of these services and of the use of the Welsh language more widely.'

This focus on changing linguistic behaviour is the basis for the Welsh Government's plans to develop a series of campaigns aimed at promoting and encouraging greater use of Welsh across all aspects of day to day life in Wales. It is an acknowledgement that using Welsh in wider spheres, such as communicating with the service providers examined in this study, is still a comparatively recent phenomenon in the history of Welsh and is still very much an ongoing process. It must be borne in mind, therefore, that its promotion is being undertaken in the absence of any longstanding tradition among Welsh speakers of using their Welsh in these formal, official or semi-official situations.

'A living language: A language for living' also outlines how statutory changes introduced by the Welsh Language Measure (Wales) 2011 ("the Measure") aim to lead to improving the availability, consistency and standard of services delivered in the Welsh language, as a means of establishing rights for Welsh speakers.

21 'A living language: a language for living – Moving forward' – Welsh Government 2014

In addition to establishing Welsh as an official language in Wales, the Measure provides a new statutory framework for the development of services in Welsh, including duties in the form of standards to be imposed on a wide range of public, private and voluntary bodies and a Welsh Language Commissioner to regulate compliance with those duties. These standards will gradually replace the existing system of Welsh language schemes provided for by the Welsh Language Act 1993.

There are two underlying principles to the delivery of services in accordance with standards: that the Welsh language should be treated no less favourably than the English language and that people in Wales should be able to live their lives through the medium of the Welsh language if they choose to do so.

This new framework of duties is intended to achieve the following aims:

provide greater clarity and consistency for Welsh speakers in terms of the services they can expect to receive in Welsh;

- within particular sectors, ensuring that there is greater consistency in terms of those bodies subject to duties with the aim of ensuring a level playing field;
- establish a system that will ensure that duties imposed on bodies are both reasonable and proportionate.
-

The Measure specifies that standards may be imposed upon providers of gas services, electricity services, post offices and postal services, as well as other companies subject to regulation²². It also specifies that duties can only be imposed on those sectors in relation to service delivery and record keeping standards²³, whereas other types of duties e.g. relating to the use of the Welsh language within internal administration may be imposed on other sectors. The service provision activities outlined in the Measure that must be provided in Welsh include correspondence, telephone calls, publications, websites and online services.

22 Schedule 8 of the Measure.

23 Record keeping standards will require organisations to keep records of their compliance with service delivery standards.

Research purpose and methodology

In October 2013 we²⁴ commissioned Beaufort Research to examine the current and potential usage of Welsh language services by Welsh speakers. There were two phases of the consumer element of our research:

- Phase 1: an initial stage of qualitative research, with six focus groups across Wales with fluent Welsh speakers. These took the form of extended length deliberative sessions which explored participants' views in depth and provided detailed qualitative feedback and case study evidence. This phase included a pre-task and activities during the discussions, testing the usage of Welsh when accessing services where Welsh is more or less actively offered.
- Phase 2: a large scale quantitative survey of a representative sample of 505 fluent Welsh speakers, providing reliable data on attitudes, experiences and behaviours.

Fieldwork took place between 5 November 2013 and 4 February 2014. The focus was on fluent Welsh speakers as it is assumed that in general, it is mostly fluent speakers or advanced learners of Welsh that would be confident enough to engage with and use Welsh language services on a regular basis.

In addition to the consumer research commissioned, we undertook work to better understand how the provision and use of Welsh language services could be improved. This involved:

- A review of theory on consumer behaviour generally and its application to the use of services in Welsh, and previous research into the use of Welsh language services.
- Gathering and analysis of information from service providers, about the Welsh language services they provide and about how they engage the public in the development of those services. In order to gain a general indication of how providers view the provision of Welsh language services we sent a questionnaire to 38 service providers (postal, energy, telecommunications, rail, bus and water service providers together with a small sample of public sector organisations including education, local authorities and the emergency services).²⁵
- A review of the Welsh language telephone services and websites offered by 42 service providers.

²⁴ Consumer Futures commissioned the research

²⁵ Sixteen responses were received, therefore this survey once again only offers a snapshot of views rather than a reflection of service providers in Wales generally.

All of the 42 service providers included in the last exercise are within the scope of the Welsh Language Measure (Wales) 2011, consisting of private companies providing postal, energy, telecommunications, rail, bus and water services, as well as a range of public bodies from the health, local government, education, central government and policing sectors. Providers of a range of different types of services were deliberately included in the review, chosen on the basis of a geographical spread to ensure consumer experience from all parts of Wales was covered. Otherwise providers were randomly selected. Of these service providers, 27 were implementing statutory Welsh language schemes.

In respect of the review of the offer that was made available on websites, the purpose was to identify the prominence of Welsh language content, not the amount of content available in Welsh. We looked for instance at whether or not the user was given an explicit choice of viewing content in Welsh or English when first visiting the site, for example through the use of a splash page²⁶ or whether Welsh speakers had to actively seek out an opportunity to use Welsh.

In gathering information from service providers, the intention was to gain useful information and insight into the extent of Welsh language provision, to identify good practice and inform how service provision could be improved. The extent to which service providers engaged Welsh speaking consumers in the development and design of services and how consumer views informed service provision was also sought. Accordingly information was sought in various ways. The recent introduction of new Welsh language legislation has led to the publication on the internet of a significant amount of information given by providers about Welsh language services, for example within responses to consultations conducted by the National Assembly for Wales and the Welsh Government. Service providers with Welsh language schemes often publish on their websites reports on the implementation of those schemes. Such publicly available information was reviewed.

Further details of the methodologies used can be seen in Appendix 1.

26 A 'splash page', for the purpose of this exercise, was the first page to appear having searched for and clicked on the organisation's website using a Google search, which commonly provides the user with an option of choosing to view the site in either language.

Research Findings

The main focus of the research was to gain an understanding of the views and experiences of fluent Welsh speaking consumers, in order to understand the language choices made by them and how Welsh language services could meet their needs more effectively. We also wanted to have a clear picture of how significant the provision of services through the medium of English as a default and Welsh services 'on request' may be to consumer behaviour and whether a proactive offer of Welsh language services also influences consumer choice.

In considering the findings of our research and the implications of this, we look firstly at the current provision of services, and the experience of fluent Welsh speaking consumers in accessing services in Welsh and what they tell us about their language preferences. Secondly, we explore the barriers that they encounter and how consumer attitudes and behaviour can inform better provision of Welsh language services in the future. Finally, we look at what defines a good quality service from a Welsh speaking consumer perspective in relation to the Welsh language.

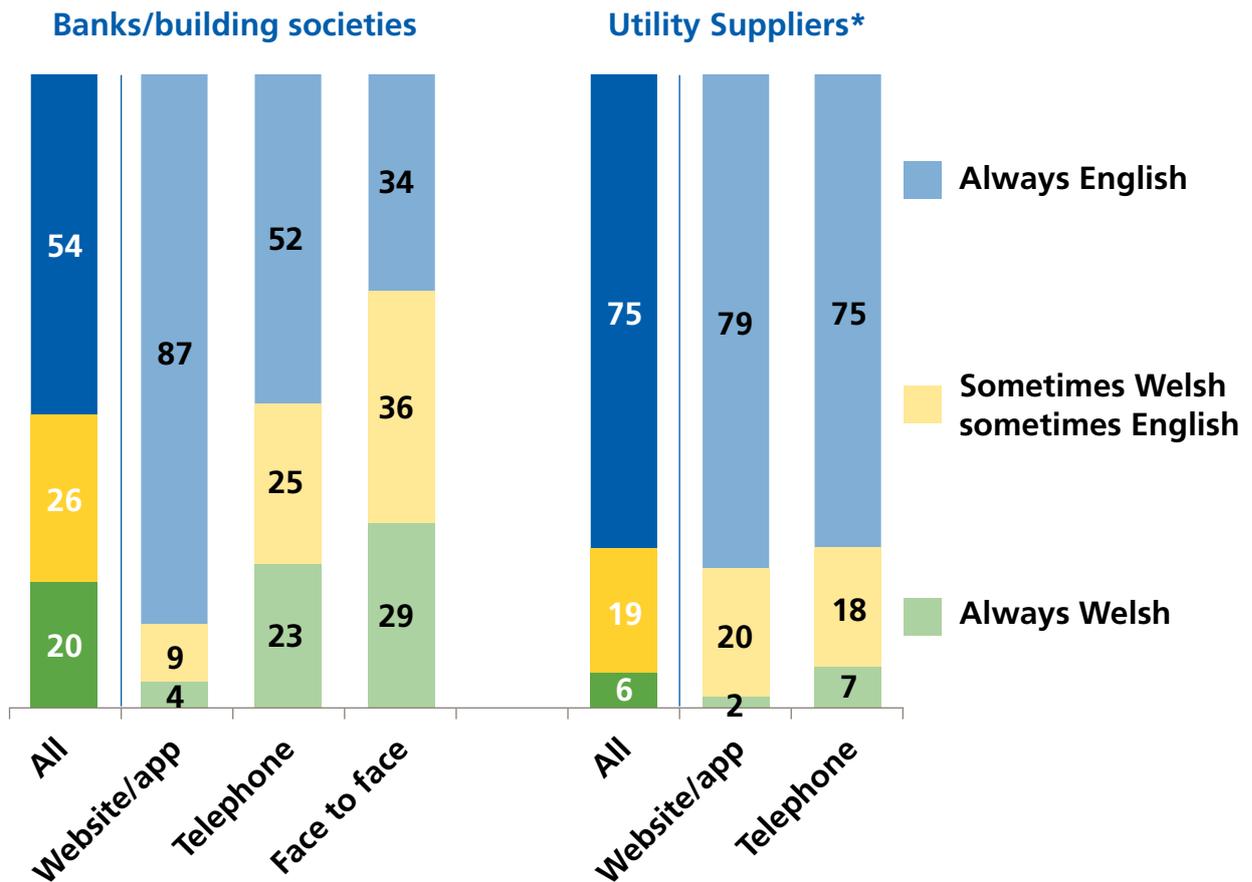
1. Welsh speakers' current experience of services

The use of Welsh by consumers

Welsh speakers' use of Welsh and experience of doing so tend to vary both by the type of service provider they are dealing with but also how they are engaging with that provider. We found for example, that when dealing with banks or building societies and companies such as gas, electricity, phone, television or broadband suppliers, that the majority of contact is always in English. Just over half of fluent Welsh speakers (54 per cent) always use English when contacting their bank or building society (across all methods of communication), while three quarters (75 per cent) always use English in their interactions with their gas, electricity, phone, television or broadband supplier (across all methods of communication).

However there are marked variations in the language use of fluent Welsh speakers depending on the setting: for instance, Welsh is most likely to be used in face-to-face contact with banks or building societies (with 65 per cent of those who usually deal with their bank in person saying they always or sometimes use Welsh and only 34 per cent that they always use English); conversely, Welsh is least likely to be used in online contact with banks or building societies (only 13 per cent of those who usually contact their bank via a website or app say they always or sometimes use Welsh, while 87 per cent say they always use English). Figure 1 illustrates these differences.

Figure 1: Language used (%)



**Gas, electricity, phone, television or broadband supplier*

Base: Those who ever contact (Banks/building societies = 496, utility suppliers = 414)

Base: Banks – website = 162, Banks - telephone = 68, banks – face-to-face = 266,

Utilities – website = 102, Utilities – telephone = 305)

Our research also highlights significant differences according to the type of service provider people are engaging with: although the majority of contact is always in English, Welsh speakers are using Welsh much more frequently in their dealings with banks and building societies than they are with their gas, electricity, phone, television or broadband suppliers. For example, almost half (48 per cent) of Welsh speakers who usually contact their bank or building society by phone say they always or sometimes use Welsh when doing so; in contrast, only a quarter (25 per cent) of those who usually deal with the other types of organisation by phone always or sometimes using Welsh. However, the proportion of Welsh speakers always or sometimes using Welsh online with utility suppliers is slightly higher than for banks and building societies (at 22 per cent compared to 13 per cent respectively).

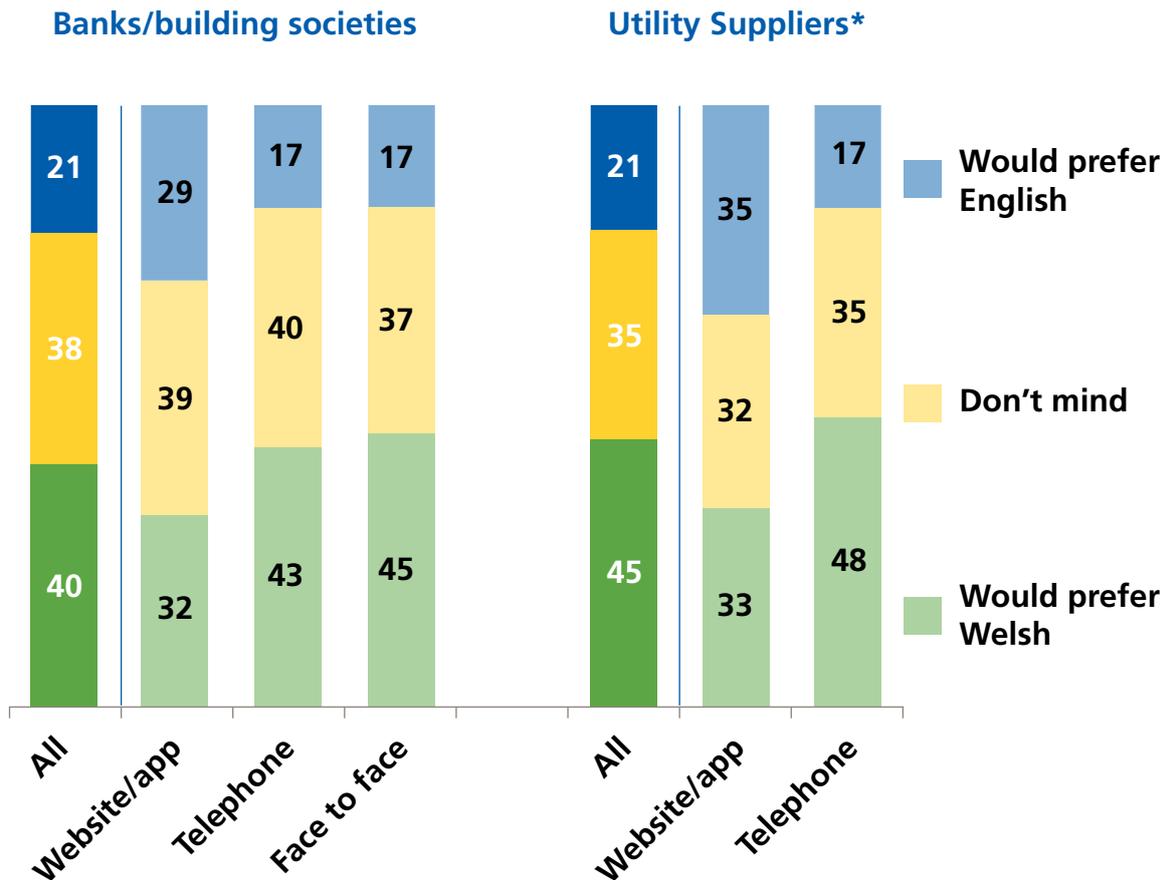
Consumers' preferred language when dealing with service providers

Whilst our research findings indicate that the majority of current contact is in English, when it comes to language preferences, around twice as many Welsh speakers told us they would prefer to use Welsh in their dealings with these service providers as those who would prefer to use English.

As shown in Figure 2, four in ten Welsh speakers (40 per cent) say they would prefer to use Welsh when dealing with their bank or building society, compared with around half this proportion (21 per cent) saying they would prefer to use English; the remainder (38 per cent) don't mind which language they use. Those most likely to say they would prefer to use Welsh include those who usually make contact by phone or face-to-face.

A similar pattern can be seen for gas, electricity, phone, television or broadband suppliers – 45 per cent of Welsh speakers would prefer to interact with these service providers in Welsh compared with less than half this proportion (21 per cent) saying they would prefer to do so in English. Again, just over a third (35 per cent) have no particular language preference.

Figure 2: Language preference (%)



*Gas, electricity, phone, television or broadband supplier

Base: Those who ever contact (Banks/building societies = 496, utility suppliers = 414)

Base: Banks – website = 162, Banks - telephone = 68, banks – face-to-face = 266,

Utilities – website = 102, Utilities – telephone = 305)

When comparing the proportion of those who say they would prefer to use Welsh with the proportion saying they currently always use Welsh, our research reveals a disparity in terms of what Welsh speakers say they want and the reality of their current experience.

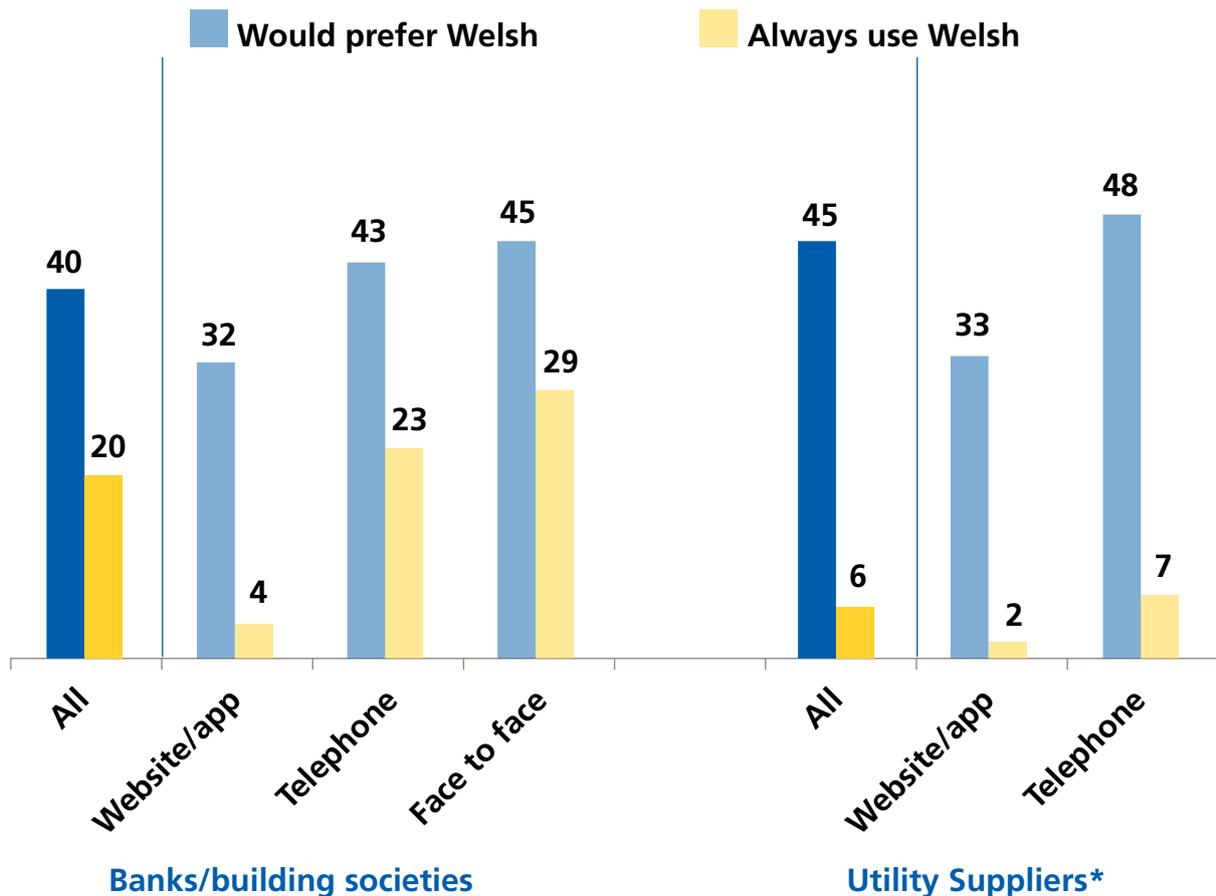
Figure 3 explains this in more detail: looking at banks and building societies first, whilst four in ten Welsh speakers who ever contact their bank or building society say they would prefer to use Welsh to do so (40 per cent), only two in ten are currently always using Welsh in these interactions (20 per cent). Examining the situation by people’s usual method of contact, the gap is widest in the case of online interactions. Just under a third of those interviewed normally dealing with their bank or building society via a website or app (32 per cent) would prefer to use Welsh, but just 4 per cent are currently doing so.

Figure 3 also shows that Welsh speakers' preference for a service in Welsh is much less likely to be satisfied by gas, electricity, phone, television or broadband suppliers than by banks or building societies at the moment.

Forty five per cent of Welsh speakers who have contact with these service providers would prefer to deal with them in Welsh but the proportion of people who actually always do so at the moment across all methods of contact is just 6 per cent.

The proportion of Welsh speakers always dealing with their gas, electricity, phone, television or broadband supplier in Welsh by each main channel (telephone and online) is particularly low for websites and apps (where only 2 per cent of people are currently always using Welsh but 33 per cent tell us they would like to do so). More people would like to use Welsh in telephone contact with these types of organisation (48 per cent of Welsh speakers would like to do so) but the proportion currently using Welsh is only 7 per cent.

Figure 3: Language used v. preference (%)



**Gas, electricity, phone, television or broadband supplier*

Base: Those who ever contact (Banks/building societies = 496, utility suppliers = 414)

Base: Banks – website = 162, Banks - telephone = 68, banks – face-to-face = 266, Utilities – website = 102, Utilities – telephone = 305)

When asked why they would prefer to deal with these suppliers in Welsh, the main reasons Welsh speakers interviewed gave us were that they were used to speaking Welsh or Welsh being their first language, followed by feeling more confident and comfortable in Welsh or finding it easier in Welsh. Some respondents also mentioned the importance of keeping the language alive and of it being a right:

Figure 4: Why would you prefer to deal with [organisation] in Welsh? (unprompted %)

	Bank/building society	Other type of organisation
I'm used to speaking Welsh / it's my first language / daily language	57	48
I'm more confident / comfortable / it's easier in Welsh	36	42
It's important to keep the language alive / it's a right / duty	15	9
I'm Welsh	3	7
I have more of a bond with Welsh speakers	3	2
It's good practice	2	1
I'm not confident in English	2	1
It's quicker to get through	*	3
Other reasons	7	9

Base: those who deal with each type of organisation and would prefer to use Welsh (banks / building societies: 201; other types of organisation: 183)

The key motivators for Welsh speakers to use Welsh therefore were being able to express oneself more easily and feeling more comfortable using Welsh. It is not always easy for them to describe precisely, but in the focus groups some refer to how they feel happier using Welsh and that the experience is more positive because of a 'bond' felt with another Welsh speaker.

I feel that it's easier to say what I wanted because I spoke in my first language. (Welsh speaker from Carmarthen)

Some focus group participants point out how important it is to them to ensure that the Welsh language remains a living language. They often refer to choosing the Welsh language option at the cashpoint as a means of helping to keep the language part of routine behaviour. Living in Wales should mean that Welsh speakers are able to use the language at every opportunity, according to some, especially where opportunities may be limited outside Welsh-speaking heartlands. This view was certainly echoed by a number of participants who felt being able to use Welsh in this way helps to give it a 'higher status'.

*I think no one understands [what the language means to us]. I think they keep count on who uses [cashpoints in Welsh], and if no one does, they are going to scrap it, so I always use it to show that we need it.
(Welsh speaker from Cardiff)*

*It's important that we all do that. Whether it's a bank, supermarket or whatever, they all get counted.
(Welsh speaker from Wrexham)*

*It is important for someone who speaks Welsh to use them, and just keep at it because they will get rid of the service if people don't use it.
(Welsh speaker from Cardiff)*

Some participants even felt that taking part in the research had reminded them of the importance of trying to do more in Welsh.

It's made me think of the purpose of doing it more, and what would happen if we didn't use it at all. You know, use it or lose it. (Welsh speaker from Cardiff)

Lastly, some Welsh speakers taking part in the focus groups believe that using a Welsh language service by phone sometimes results in a better quality, quicker resolution to their query because the call 'goes straight through' to someone who can help, rather than being passed on to other staff. This was a minority view, however.

As seen in figure 2, some participants indicated a preference for English. Where this was the case, a more varied range of reasons is given. Aside from personal reasons such as being more confident and comfortable in English, the first language of some Welsh speakers, and finding it easier in English (all particularly high amongst the 16 to 34 age group and those who started speaking Welsh at school or as an adult), some barriers to using Welsh emerge:

- habit – many Welsh speakers are accustomed to using English in these situations
- lack of confidence and fear of mistakes or misunderstandings when dealing in Welsh (especially for transactions linked to money or finances)
- concerns over encountering difficult language, technical terminology or unfamiliar words in Welsh

We will examine these and other barriers in further detail in the next part of our report but what our research tells us, on the face of it, is that the language preference of a significant number of fluent Welsh speakers is not being satisfied at present in terms of their interactions with service providers. It is a much more complex issue than simply one of supply and demand, as we will see later in the report. Key to this are a number of issues, including consumer behaviour and habit, and the way in which services are delivered.

A snapshot of consumer experience

Having identified differences in the types of services fluent Welsh speakers say they want to access in Welsh and noted the complexities of this issue, in helping to understand these we now explore the accessibility and availability of services in Welsh. We believe to better understand the extent to which services are available in Welsh, we need to consider where these are provided and how accessible they are. We conducted an audit of the telephone and online services provided by 42 service providers looking at how services are offered. We were interested in determining the language choice presented to Welsh speaking consumers in their first contact with the service provider and therefore how easy it was for someone wishing to access a service in Welsh to do so.

Due to the limited sample size this can only provide a possible indication of how services are being delivered generally. However it provides a useful insight as to the way a wide variety of providers, across a range of sectors, including some of the big names in Wales, operate. We looked at the prominence of Welsh language content. We also considered whether or not the user was given a clear and equal choice of viewing content in Welsh or English when first visiting the website, or whether Welsh speakers had to actively seek out an opportunity to use Welsh and if that opportunity was clear or difficult to find²⁷.

Figure 5: Review of availability and accessibility of website content in Welsh

	Number of websites reviewed	% of all websites reviewed
Explicit choice given to view content in Welsh or English	6	14%
English content provided as a default with a clear choice given to view content in Welsh	18	43%
English content provided as a default with Welsh content available but not easy to find	6	14%
No option given to view content in Welsh	12	29%
Total	42	100%

Our findings suggest that Welsh speakers are at a disadvantage where they wish to access website content or services through the medium of Welsh, with over half the websites

²⁷ This is explained in more detail in Appendix 1

requiring Welsh speakers to actively seek a Welsh version and 29% not giving an option at all. This is a particularly important issue given the increasing shift to provision of services online.

A review was also conducted of the telephone services provided by the same set of service providers. Some included within the exercise offered a variety of telephone helplines with some offering a dedicated Welsh language helpline. The review focused on the helpline that members of the public would be likely to use most frequently to communicate with the provider e.g. the 'general enquiries' helpline, the 'bill enquiries' helpline in the case of utility providers for instance. Two organisations did not have telephone services available, therefore this part of the exercise was undertaken with 40 service providers.

As with the website survey, the following data should only be considered a broad indicator of the availability and accessibility of telephone services in Welsh. We looked at whether service providers offered an explicit choice of a service in English or Welsh from the outset, for example a bilingual recorded message enabling the user to choose to continue in Welsh or English or whether accessing a Welsh language service proved more difficult.

Figure 6: Review of availability and accessibility of telephone services in Welsh

	Number of helplines called	% of all helplines called
Explicit choice of a service in Welsh or English	14	35%
Service provided in English as a default with a clear choice of a Welsh language service available	6	15%
Service provided in English as a default with a Welsh language service available but not easy to find	2	5%
No Welsh language service available	18	45%
Total	40	100%

Over one third of the helplines we reviewed provide a clear choice of a service in Welsh (compared with only 14% of websites), this included where a service provider offered a specific telephone number for a Welsh helpline, if this number was easy to find). A further 20% were available to Welsh speakers willing to actively seek out a Welsh language service. However 45% of the telephone services we looked at do not provide a Welsh language service at all. In terms of UK-wide providers (45% of the sample), some provide a helpline

with an option to choose a Welsh language service, others have a separate Welsh language helpline. Of the 5 UK-wide service providers who have a separate Welsh language helpline we found that 2 were not clearly publicised and the required number was very difficult to locate on the website.

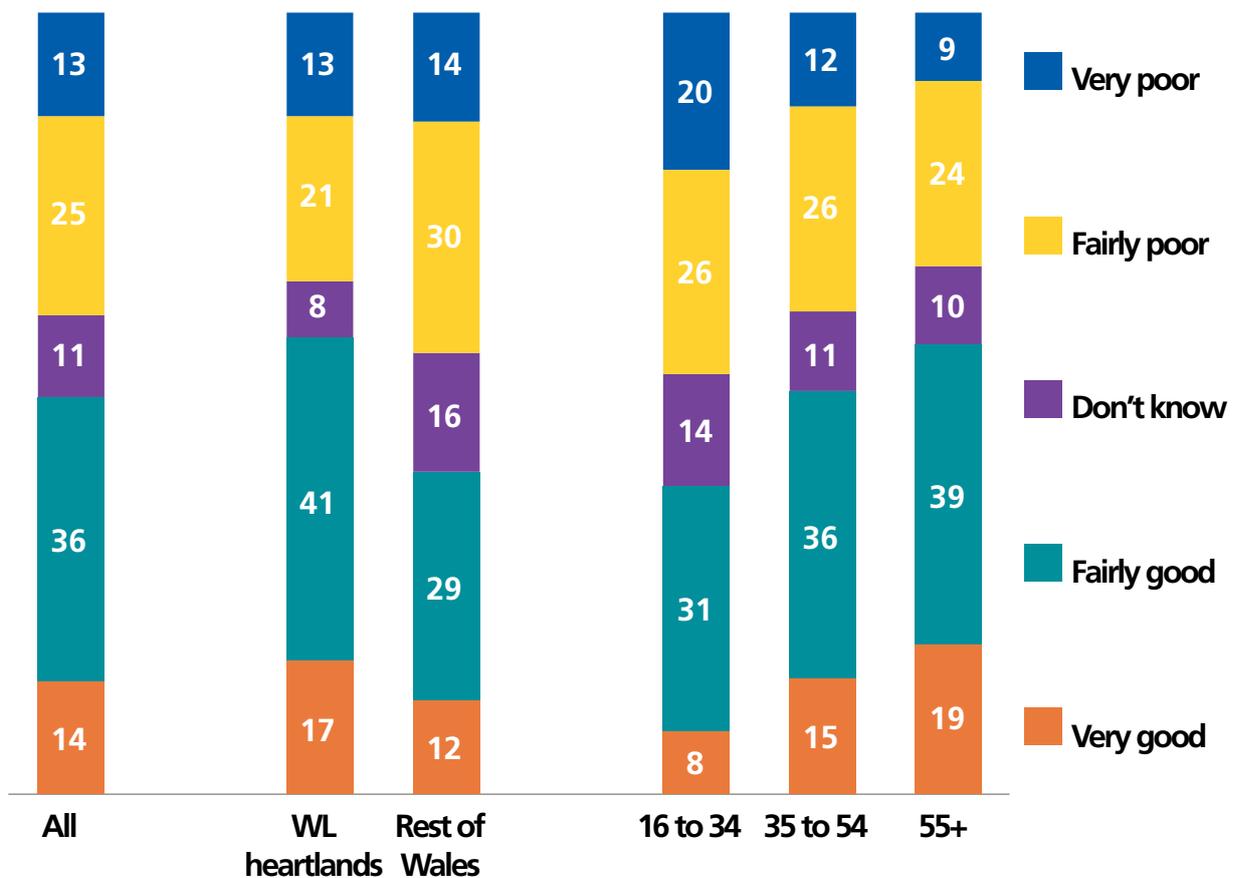
Our study on websites and helplines therefore initially suggests some fundamental barriers to Welsh speakers accessing services, consisting of a lack of choice or opportunity to use Welsh, and also insufficient visibility and availability of provision, where this exists. It is arguably less likely that Welsh speakers will use services where these are difficult to access easily, as we will discuss later in the report.

How satisfied are Welsh speakers with the Welsh language service currently offered?

Having considered issues of visibility and availability which may impact both on a Welsh speaker's access to and use of, any Welsh language services we now look in more detail at Welsh speakers' views of the services that are currently provided. This may provide further insight into usage levels of current services and what fluent Welsh speakers need, want and expect from service provision.

When asked to rate the quality of Welsh language services currently provided to customers in Wales by service providers such as banks, gas, electricity, phone, television and broadband suppliers, Welsh speakers' opinion is divided. Half (50 per cent) give a positive rating of 'very good' or 'good', while nearly four in ten (38 per cent) are negative, rating them as 'poor' or 'very poor' (see figure 7 below). As shown below, of all the age groups, younger Welsh speakers are less likely to give a positive rating.

Figure 7: Overall satisfaction with WL services provided by these service providers (%)

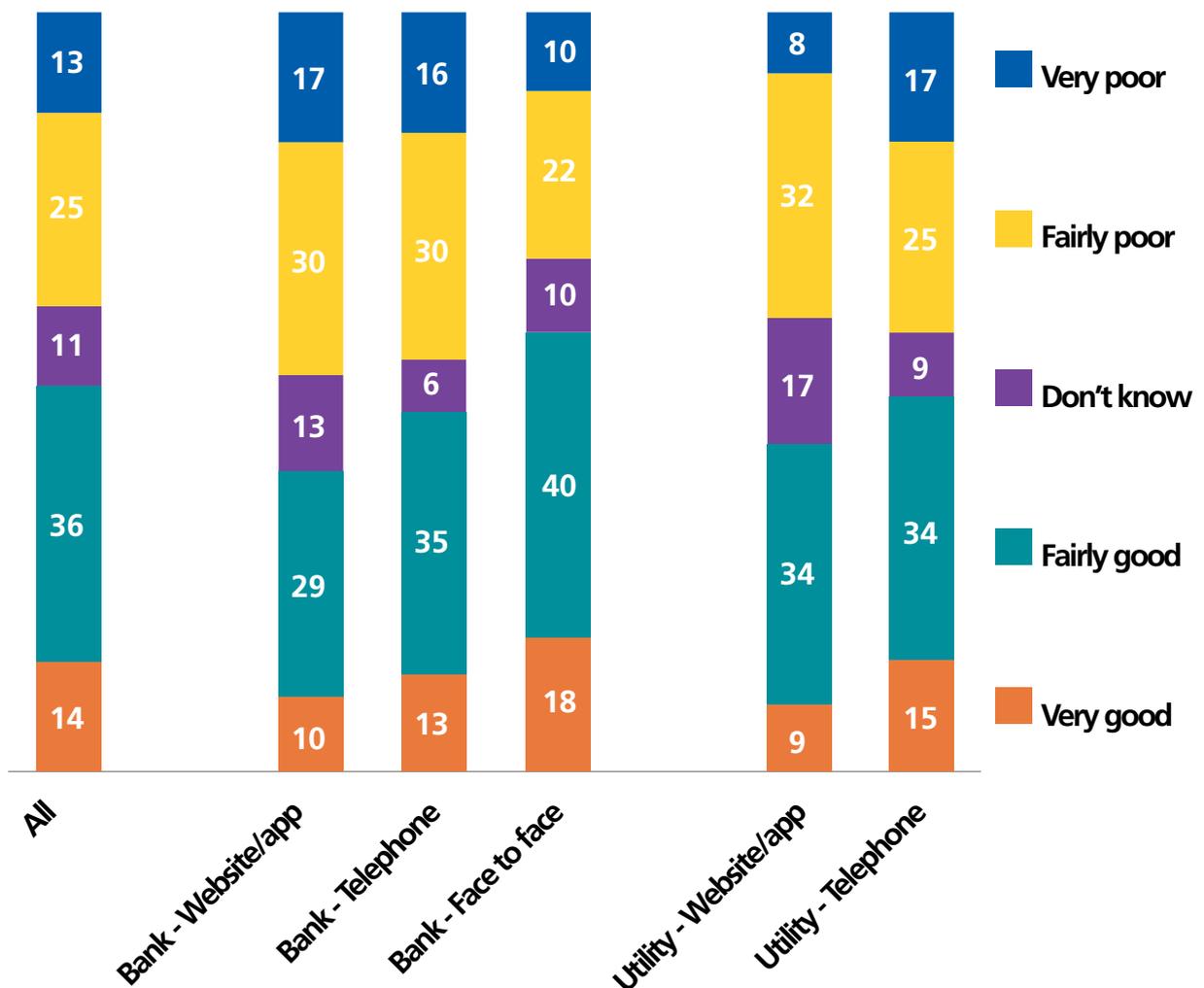


Base: All (505)

Welsh Language Heartlands: Gwynedd; Anglesey, Ceredigion, Carmarthen.

Examining perceptions of Welsh language services on offer by users' usual method of communication, it can be seen that Welsh speakers who usually deal with their bank or building society and gas, electricity, phone, television and broadband supplier online (by website or app), give the least positive ratings. Around four in ten (39 per cent) of these users rate the Welsh language services provided by these companies as 'very good' or 'good', but the proportion of telephone and face-to-face channel users saying this is higher. This mirrors the current level of usage of Welsh by channel (that is, highest for face-to-face interactions and lowest for online interactions).

Figure 8: Overall satisfaction with WL services provided by these service providers (%)



Base: All (505)

Despite the mixed ratings of the Welsh language services currently on offer, over four in ten Welsh speakers (44 per cent) feel that these services have improved over the past few years. A slightly lower, but still significant, proportion (36 per cent) feel there has been no change, while fewer than one in ten (9 per cent) are of the opinion they have worsened.

Whilst just over half of Welsh speakers (52 per cent) say that their usage of Welsh language services provided by service providers such as these has stayed the same over the past few years, nearly three in ten (28 per cent) say it has increased. Only 13 per cent say it has decreased.

When asked how the Welsh language services provided by banks, gas, electricity, phone, television and broadband suppliers compare with those provided in English, over four in ten Welsh speakers (44 per cent) consider them to be the same standard as the English. Around one in four (26 per cent) think they are worse than those provided in English, however, while the proportion saying they are better is lower, at 18 per cent.

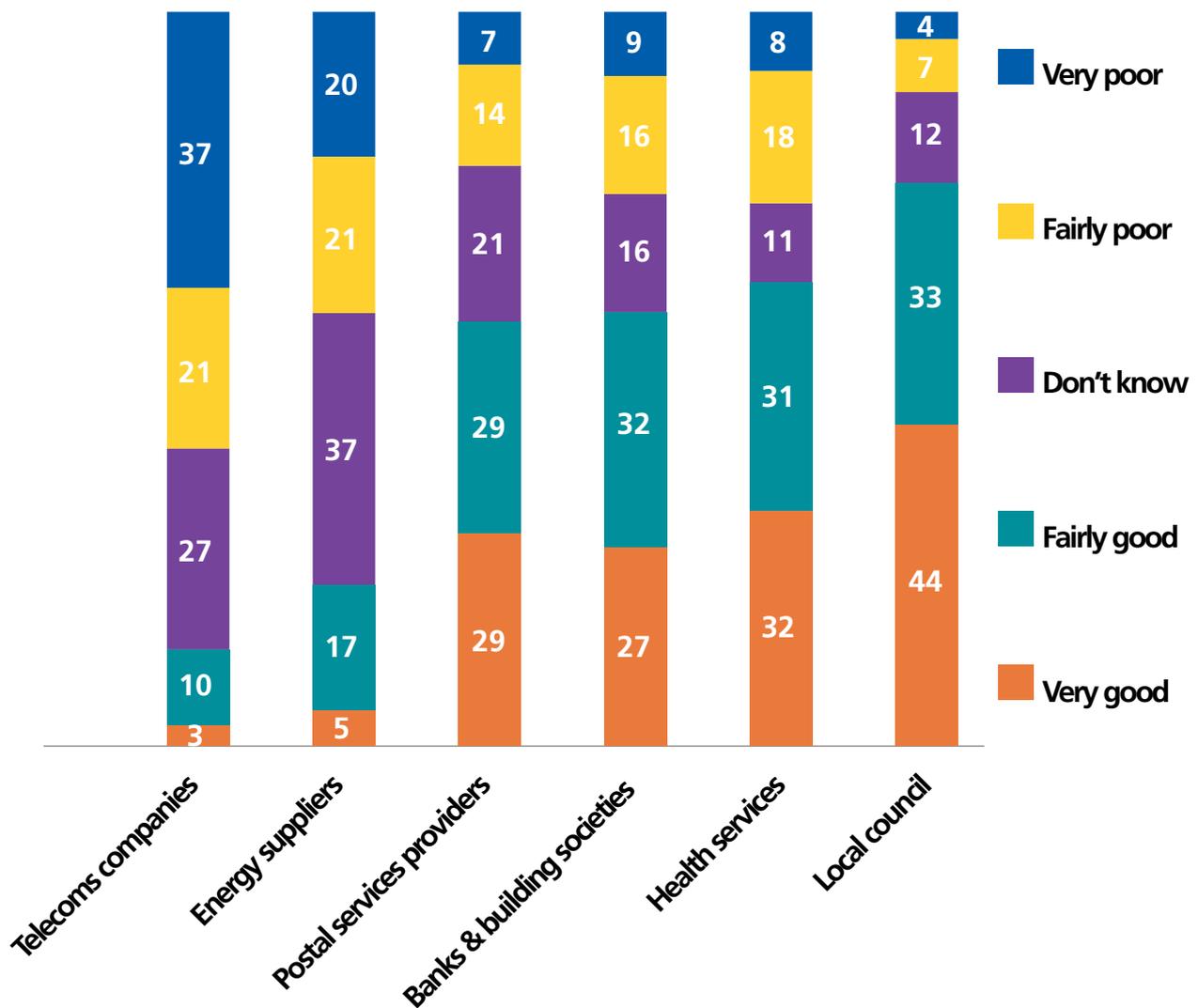
Those living outside Welsh language heartland areas are less likely to rate the Welsh language services provided as better than the English and more likely to rate them as worse than those living in areas where Welsh is most widely spoken. The difference is most marked in South East Wales, where only 12 per cent of Welsh speakers feel Welsh language services provided by these companies are better than the services available in English (compared with 18 per cent overall) and 40 per cent consider them to be worse (compared with 26 per cent overall).

As well as obtaining a general rating of the Welsh language services provided by these types of company, Welsh speakers were asked to think about the different service providers that they have contact with and to rate each category of organisation separately.

The results are presented in figure 9 below and show that telecoms companies and energy suppliers are the types of organisation whose Welsh language services are most likely to be rated as poor by Welsh speakers. Almost six in ten of those interviewed (58 per cent) give telecoms companies a rating of 'very poor' or 'fairly poor' for their Welsh language services and only 13 per cent rate them as 'very good' or 'fairly good'. The proportion of people rating the Welsh language services of energy suppliers such as gas and electricity companies as 'very poor' or 'fairly poor' is 41 per cent, compared with 22 per cent rating them as 'very good' or 'fairly good'.

More Welsh speakers are positive than negative about the Welsh language services provided by all other types of provider about which they were questioned, particularly in the case of their local council, whose services in Welsh are described as good by nearly eight in ten overall (77 per cent). This may be expected, given the statutory obligations on public sector providers since 1993 to have Welsh Language Schemes in place. Even so, for all these other types of organisation a minority, ranging between 11 per cent (in the case of the local council) to 26 per cent (for the health services), are of the opinion their Welsh language services are poor.

Figure 9: Rating of WL services (%)



Base: All (505)

Conclusions

The majority of contact that fluent Welsh speakers have with organisations such as banks, building societies, gas, electricity, phone and broadband companies is currently in English. Overwhelmingly, English dominates communication with utility/telecoms providers in particular.

While the majority of current contact with providers is in English, our research shows that around twice as many Welsh speakers would prefer to use Welsh in their dealings with these providers as would prefer to use English. When comparing those who say they would prefer to use Welsh with the proportion saying they currently always use Welsh, a sizeable gap is evident between demand and supply of Welsh language services. The language preference of large numbers of Welsh speakers, therefore, is not currently being satisfied.

The key reasons for wanting to use Welsh were the fact that Welsh speaking consumers felt they could express themselves more easily and felt more comfortable using Welsh.

While Welsh speakers' opinion on local councils' and health services' Welsh language provision is the most positive, ratings are most negative for the provision offered by telecoms companies and energy suppliers..

It may be argued that if service providers want Welsh speakers to use the services that they are investing in, then provision needs to be improved, particularly to meet the expectations of younger Welsh speakers. In particular, service providers need to improve their online offering.

Our evidence shows that access to services is also variable not only amongst service providers but between channels. This means that consumers are not able to access Welsh language provision consistently within an organisation, as well as between different types of organisation. Citizens Advice would argue therefore that these are significant barriers to encouraging usage and take up of Welsh language provision. However as our findings later will show, consumers want to be able to access services quickly and easily. Understanding consumer needs and how consumers find services should therefore be key and at the heart of service design and delivery.

2. Barriers to using Welsh

Context

Despite the fact that a number of services continue to be available in English only there has been an increase in the services that are now available in Welsh. However, there is little research and, as a result, a lack of a common understanding of why Welsh speakers choose to use or not use them. Some service providers claim that the level of provision in Welsh is influenced by a low level of demand for services in Welsh. Indeed in response to our review of service providers, several organisations told us that any further provision of services in Welsh would be conditional on an increase in the use of the services currently provided in Welsh. For example, one provider noted that

'...consistently low uptake by consumers of the Welsh services already on offer...does not positively contribute to consideration of investment in further service development.'

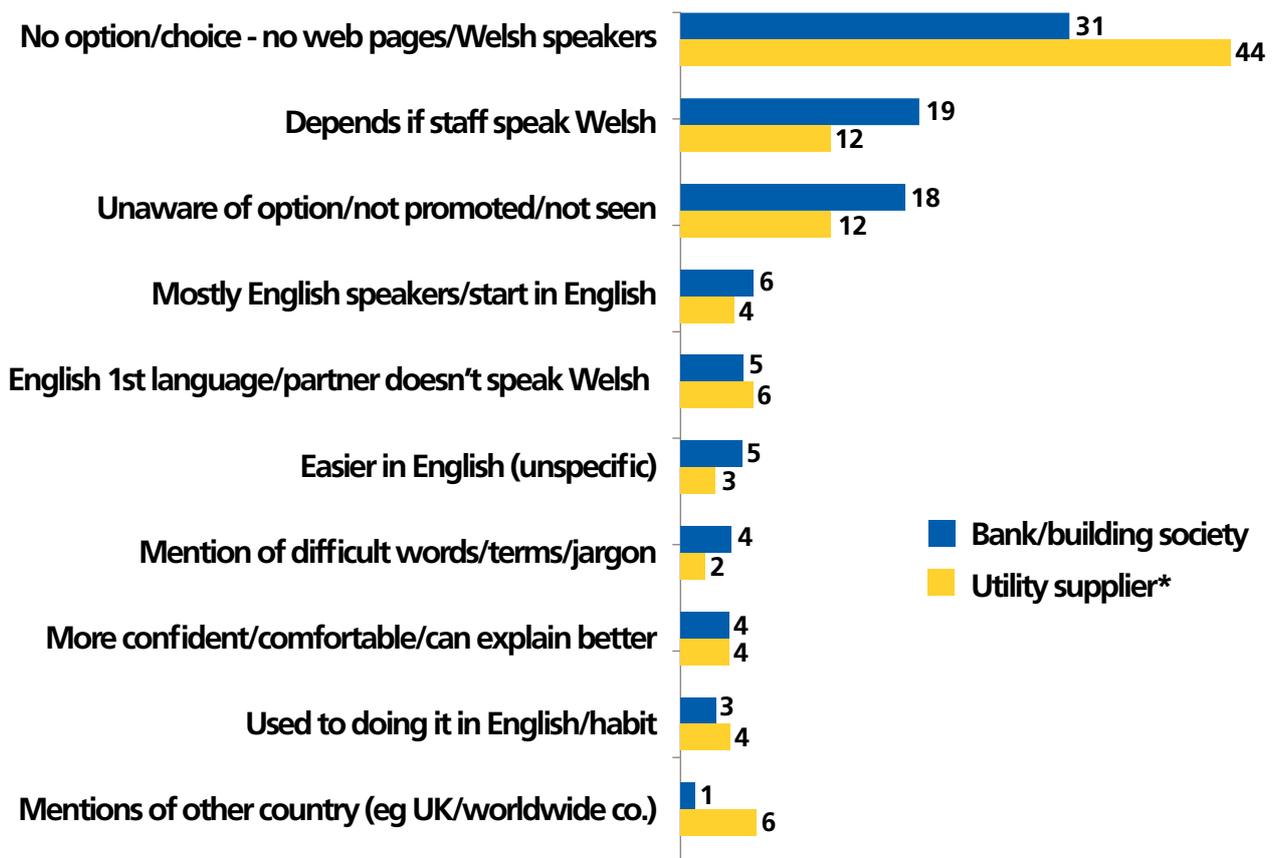
On the other hand however, others, including researchers and language campaigners, point to an obvious appetite for Welsh language services that is not satisfied by current provision leading to a lack of confidence or trust in Welsh language services which becomes a barrier to their use. Our research has also touched on some possible barriers in visibility and access to, as well as availability of Welsh language services, which are key barriers to the use of Welsh in accessing services. In this section we seek to explore further the reasons why fluent Welsh speakers do not access current provision and consider in more detail the extent and appropriateness of provision.

In our survey of Welsh speakers, those who said they do not always use Welsh in their dealings with their bank or building society or with their gas, electricity, phone, television or broadband supplier were asked why this was the case. Not having the option or choice to use Welsh was the main spontaneous reason given (31 percent in the case of dealings with for banks / building societies and 44 per cent for utility suppliers respectively), followed by not always having the opportunity to do so (if staff are not Welsh speakers), together with uncertainty about whether there is a Welsh language service available.

In addition, a small percentage of people mentioned issues around their confidence in speaking Welsh, concerns over coming across difficult or technical terms in Welsh and finding it easier or being more comfortable in using English in these situations.

Spontaneous reasons for not using (or not always using) Welsh when dealing with their bank or building society or with their gas, electricity, phone, television or broadband supplier are outlined in Figure 10.

Figure 10: Reason for not (always) using Welsh (unprompted, %)

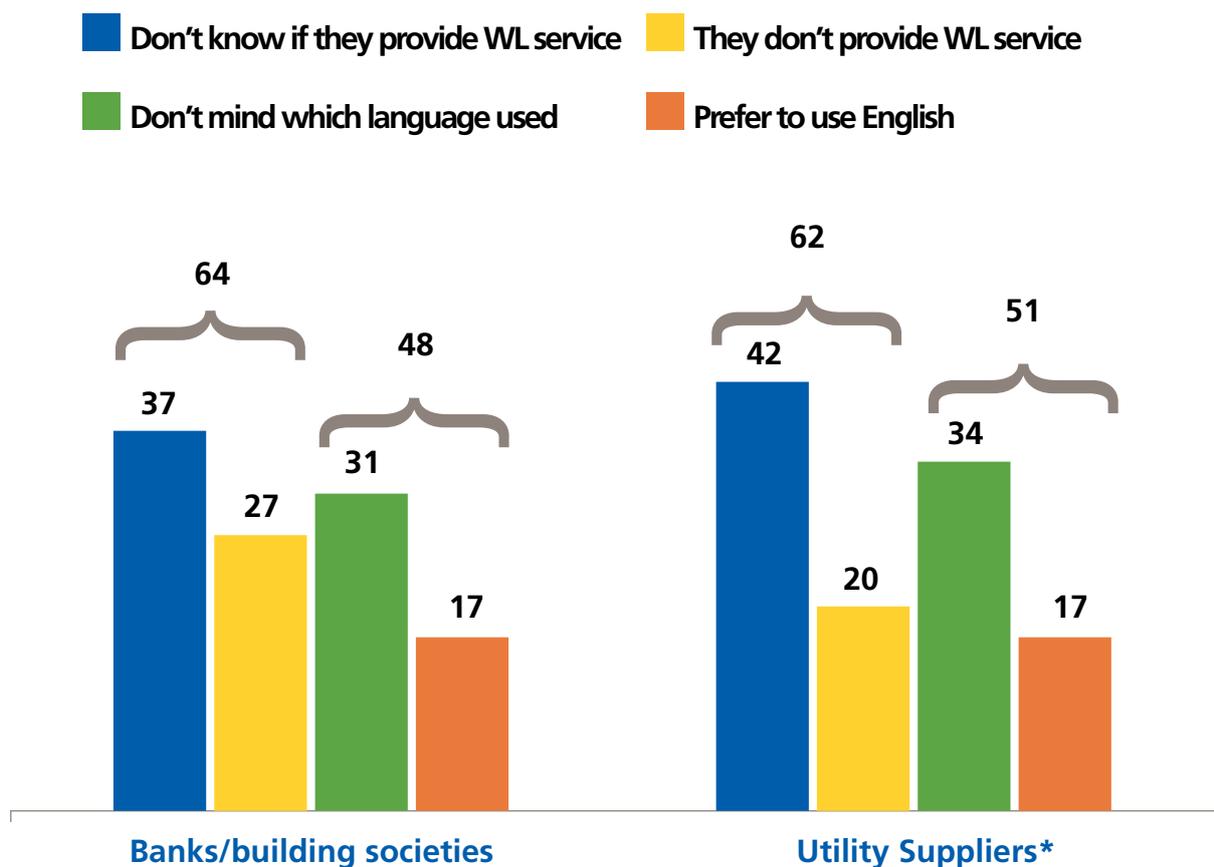


**Gas, electricity, phone, television or broadband supplier*

Base: Those who ever contact (Banks/building societies = 496, utility suppliers = 414)

In order to further understand the factors limiting the use of Welsh in these interactions, Welsh speakers who do not (or do not always) use Welsh were prompted with a list of possible reasons and asked which of them applied to them (see figure 11). They could choose as many or as few of these reasons as they wished, so the responses do not total 100 per cent.

Figure 11: Reason for not (always) using Welsh (prompted, %)



**Gas, electricity, phone, television or broadband supplier*

Base: Those who ever contact (Banks/building societies = 496, utility suppliers = 414)

This illustrates that lack of awareness of a Welsh language service offer and the absence of a Welsh language service are more significant barriers to using Welsh in these situations than a preference for using English. Around four in ten Welsh speakers (39 per cent) who ever contact their bank or building society or gas, electricity, phone, television or broadband supplier say the fact they 'don't know if they provide a Welsh language service' is a reason why they don't (or don't always) use Welsh when dealing with them. Between two in ten and three in ten of this group say the fact 'they don't provide a Welsh language service' is a reason, compared with less than two in ten (17 per cent) saying they 'prefer to use English'.

However, a sizeable proportion of Welsh speakers (32 per cent) say they 'don't mind what language I use'.

Welsh speakers living in South East Wales and those in the 16 to 34 age group are most likely to report they don't know if their bank provides a Welsh language service. People in the younger age group are also more likely to say they 'don't mind which language they use' and to say 'I prefer to use English' when dealing with banks and building societies and other types of service providers than any other age group.

Lack of visibility and information on availability

Previous research by Consumer Focus Wales identified the importance of visibility in the usage of Welsh language services:

“There is a lack of visibility of some Welsh medium services that discourages these being used to their maximum potential.”²⁸”

We decided to test the visibility of Welsh language options and the presence of an active offer through our focus groups. We gave participants a task prior to attending the session to find out information about smart meters²⁹ from an energy company. The company website identified in the task does refer to the Welsh language and there is a Welsh language helpline. However, Welsh speakers attempting this task tended to carry out the conversation in English (where they were able to get through) because they did not see, or were not offered, a Welsh language option even though one exists. It also did not occur to them to actively seek out a Welsh language service as they were focused on attempting to answer the query about smart meters. The exercise showed that when the first contact is in English, the conversation tends to continue in English: 'I used English, as the person I spoke to was English'; 'We used English, because the website was in English'.

Bearing in mind the findings of our snapshot survey of websites and helplines, where we found lack of accessibility as a fundamental barrier, we believe a lack of visibility of a Welsh option or a telephone response with no indication of language choice can combine with the habit of using English more than Welsh with service providers, and online generally, to form a significant barrier to using Welsh.

28 Gwasaniaithau (Consumer Focus Wales 2010) – p4&5

29 Smart meters are the next generation of gas and electricity meters helping people keep track of the energy used in their home, and cutting out the need for meter readings as they can be read remotely by energy suppliers. The UK government plans for every home and business in the UK to have a smart meter for electricity and gas by the end of 2020.

*When you go on the internet, it's in English, when you go on a website, it's in English. Everyone here understands English so there's no point doing it in Welsh if it's already in English. If it's already in Welsh . . . I think if you know yourself that it's going to come up in Welsh, you're more likely to go on to it [in Welsh].
(Welsh speaker from Carmarthen)*

When searching online for a document (which is available in both English and Welsh) another participant gave their view on their experience and expectations:

*It was like it did a default to the English. . . . It's in English and there is the Welsh button to toggle], and then it's obvious, but I would expect something totally bilingual from the start.
(Welsh speaker from Cardiff)*

Visibility can also be an issue with web page layout. Where a Welsh option was not offered with equal immediacy and prominence to English in our focus groups, some Welsh speakers acknowledged that they stick to the default language used first, even if switching to Welsh might only involve a single click.

*It's more work for you to change [a website] to Welsh. Even if it's only one button, just going to the bottom and pressing a button. We're all basically lazy and can't be bothered. . . . Usually you want information in a hurry, you want it now. You're either rushing or you're at work and you want correct information at that time and you don't want any obstacles in your way, even if it's just a small thing like pressing a button to get it in Welsh. We understand English, why would we make more work for ourselves?
(Welsh speaker from Carmarthen)*

Lack of consistency

Our research has identified that inconsistency of offer can impact on usage. When people encounter a lack of consistency in terms of quality or continuity in Welsh language services, their confidence and trust in those services are diminished and this acts as a barrier to further use. Participants in our focus groups highlighted that a lack of Welsh language service provision or issue around the consistency of delivery can result in a negative experience leading to a negative perception of an organisation.

In particular a lack of consistency of an offer in Welsh can be a source of dissatisfaction for some Welsh speakers. In one example a Welsh speaker was making an enquiry with a postal provider. Having followed the numbers through the automated system, the Welsh speaker reports that the call took place in English because 'it wasn't possible to have anyone who spoke Welsh'. The process also 'took too much time, [and] too much pressing buttons'.

Inconsistencies with a Welsh language offer can also be encountered online. When carrying out an online task during the focus groups, one participant highlighted an example where he

feels that both web pages should look the same in terms of layout and images; the site used symbols on the Welsh page instead of the images used on the equivalent English language pages. It is not clear to Welsh speakers why they are different.

It was easy but the logos were different in both languages. . . . I was a bit confused. (Welsh speaker from Cardiff)

An issue with an inconsistent offer can extend across communication channels or service areas. Some Welsh speakers, for example, welcome the Post Office's 'Welsh speakers call' option on the Contact us homepage of the website but cannot see any Welsh option with online content.

Well there's no 'Cymraeg' button actually [online]. I didn't see one. But for the phone number, it's better. (Welsh speaker from Wrexham)

On a similar note, a Welsh speaker recalls a Welsh language service offered by a telecoms provider phone, but found that on using the service, that with any broadband related queries are dealt with in English. This inconsistency affects the Welsh speaker's perception of the organisation – he is unhappy when this happens and feels that the organisation does not care about the language.

If it's anything to do with the phone they're great – you get a Welsh service. Anything to do with the internet or something and you've got no hope of having a Welsh service. If you go through to a Welsh line, they say that they apologise but if it's anything to do with[some of the providers particular service offers]you can't have a service through the medium of Welsh. . . . They don't care at all. (Welsh speaker from Wrexham)

Accessibility

Our findings echo previous research³⁰, which tells us that one key influence on consumers' decisions, in terms of service use, is the accessibility of services. The Welsh Government's 'Building Better Customer Service' framework specifies accessibility as the first core principle of effective services. Accessibility, in relation to services, comprises both the availability of services and ease of access to services. Certainly a lack of visibility of services in Welsh is a recurring finding within research into the use of these services. Research commissioned in 2013 by the Welsh Government itself, together with S4C and BBC Wales, found amongst Welsh speakers 'low awareness or visibility of the Welsh language, particularly online'³¹. This raises the question therefore, whether services provided in English as a default with some services provided in Welsh on request or in a less visible way, compromises this core principle of effective service.

30 Beaufort Research (2000) Sample of 1,191 people aged 16+, 416 of them non-Welsh-speaking 511 able to speak Welsh fairly well.

31 Exploring Welsh speakers' language use in their daily lives (Beaufort Research 2013) – p4

Some observers have referred not only to the practical influence of the provision of services in English as a default on the use of services in Welsh, but also to its psychological impact. D. Cunliffe suggests that service providers, who offer their website content in English as a default, may be conveying a greater status for English than Welsh, which may influence the status of Welsh within the minds of users and consequently discourage the use of services in Welsh³². That view is supported by some academic research.

"...respondents talked about using services in the English language but 'asking' for services in the Welsh language. Therefore, English was positioned as the high prestige language in Wales, the default or usual language of any formal encounter in service settings. Welsh was positioned, in turn, as the lower prestige language in Wales, a language poorly catered for that could rarely be used..."³³

English as the dominant language

When Welsh speakers told us in which language they normally interacted with the service providers which were the focus of our research, across different methods of communication, they indicated that English is the dominant language. Some Welsh speakers also remarked how it depends on whether they know that the person they are interacting with speaks Welsh, for example face-to-face (at the Post Office) or by phone, which is also about visibility of a Welsh service.

The online tasks we asked focus group participants to undertake highlighted they tend to use English as the default language online, sometimes without making a conscious decision over which language to use.

*I didn't know there was a Welsh thing. It's just automatic [online in English]. . . . I just expected it to be in English.
(Welsh speaker from Carmarthen)*

The evidence from our research therefore suggests that where Welsh speakers are faced with English as a default option in terms of service provision, a number of barriers can prevent them from choosing a Welsh language option: starting a communication in English often leads to completing the communication in Welsh; believing that the Welsh version might not be of an equal standard to the English version; and not wanting to add extra steps to their customer journey. In order to establish the solutions to such barriers, it is useful in the first place, to look at how consumer choice is influenced in general.

32 Promoting minority language use on bilingual Web sites (2008) – D Cunliffe, University of Glamorgan

33 Current Issues in Language Planning – Minority language non-use in service settings: what we know, how we know it and what we might not know (Glyndwr University) – p258

Defaults

Our findings present interesting challenges in how to support Welsh speakers to use the services they say they want to, where these exist. Clearly the evidence presented here has highlighted the importance of accessibility and visibility. In recent times policy makers and service providers have turned to the theory of behavioural economics to seek to understand the behaviour of services users and the choices they make. The insights offered by such research enable governments and providers of public services to manipulate the choices made by individuals for the benefit of society, and provide the private sector with information which is often key to their commercial success.

Behavioural economics highlights two principles which, when considered alongside the research available on the use of Welsh language services, may be useful in explaining the use and non-use of services in Welsh – the influence of defaults and consumer habits.

It is relevant to look at the influence of defaults here. By this we mean an option that is pre-selected for us if we do not make an active choice to change it. According to behavioural economics, the choices people make are significantly influenced by default options available to them:

‘Defaults exert influence as individuals regularly accept whatever the default setting is, even if it has significant consequences. Whilst we behave in crazy ways according to the laws of standard economic theory, we behave in predictably lazy ways according to the lessons of behavioural economics... Structuring the default option to maximise benefits for citizens can influence behaviour without restricting individual choice.’³⁴

“One important lesson from behavioural economics is that individuals tend to go with the flow of pre-set options, or defaults, often regardless of whether the pre-set options maximise our individual or collective wellbeing.”³⁵

Previous research and commentary on the provision and use of Welsh language services suggests that at least some services in Wales are provided in English as a default. Our own research emphasises this with half of the websites we analysed requiring Welsh speakers to actively seek a Welsh version (whilst 29% gave no option to view content in Welsh at all). We believe therefore that this is likely to be influencing Welsh speakers to use services in English.

“...if a user is unaware, and not proactively offered a service in a language, how (and indeed why) would the lay person go out of his or her way to find and use it?”³⁶

34 ‘MINDSPACE – Influencing Behaviour Through Public Policy’ - Cabinet Office p22&23

35 ‘Behaviour Change and Energy Use’ - UK Government’s Behaviour Insights Team p7

36 NUDGE! NORMALIZING THE USE OF MINORITY LANGUAGE ICT INTERFACES (Keegan and Evas 2011) – p51

“It could be argued... that if one is expected to ask for a service in Welsh where an English-medium service is provided automatically, that access to a Welsh-medium service is not ‘normalised’.”³⁷”

If having to ‘opt in’ to services in this way discourages the use of services in Welsh, as implied by the research available, then intervention will be required in order to increase the use of services in Welsh, as aimed for by the Welsh Government.

We believe therefore, that it is important for service providers to consider how the delivery of services can be adjusted or designed in such a way as to present a true choice for Welsh speakers, encouraging take-up of services that best meet their needs. This is key for service providers already providing Welsh language services, particularly where usage is low, but also for all service providers who will be subject to the standards to ensure that they really are supporting Welsh speakers to access services in the way that they say they wish to. Later in this report, we discuss examples of how this may be achieved.

Behavioural economics also highlights the considerable influence of habits on people’s behaviour. An influential paper produced by the Cabinet Office, ‘MindSpace’, considers the theory of behavioural economics in relation to policy making and states that

“Habits are ‘behavioural dispositions to repeat well-practiced actions given recurring circumstances’, and they usually develop when actions are repeatedly paired with an event or context (e.g. drinking coffee after waking up). Although the initial pairing may have had some conscious purpose, once acquired the action can be triggered just by the event or context, even in absence of the person’s intention – or even in opposition to their intention.”³⁸”

Language use habits in general are formed over time and are also considered to be a barrier to making more use of the Welsh language when interacting with service providers. Some of our focus group participants for example, explained how they learned Welsh at school and were brought up in an English-speaking household. Therefore they heard / saw their parents carrying out routine activities in English. Using more English than Welsh in their daily lives is a further reason given by some Welsh speakers for not choosing or thinking of choosing to use the Welsh language when dealing with service providers. The language of the home can also vary. Some participants who took part in the focus group held in Rhondda Cynon Taf for instance comment on how a lack of opportunity to use Welsh on a regular basis impacts on their propensity to use Welsh when interacting with service providers and continues a perpetuating cycle of the use of English as the dominant language.

37 WLGA evidence to the National Assembly for Wales’ Welsh Language Review – p2

38 ‘MINDSPACE – Influencing Behaviour Through Public Policy’ - Cabinet Office p76&77

My mum and dad don't speak Welsh, when you are small you hear dad on the phone to companies, so all through school a lot of the language – you don't use that language to pay bills, you haven't had the experience. (Welsh speaker from Cardiff)

I come from a family where no-one speaks Welsh. I went to a Welsh school, but at home I don't speak Welsh. It's only since coming to [this town] that I'm confident speaking Welsh because I feel more Welsh in [here] than I do at home. And I think that has a great effect because if I use a cashpoint I do it in English because of my upbringing. I think it's got a lot to do with whether you grew up speaking Welsh. (Welsh speaker from Carmarthen)

In more formal situations Welsh speakers' readiness to use their Welsh is often found to be linked to their confidence – or lack of confidence. It was fairly common in the focus groups for some participants to comment that they expect the Welsh language used online or in formal interactions to contain vocabulary with which they may struggle. This can involve, for example, more formal or technical subjects or difficulty when completing a form. Some also state that the Welsh used online may not reflect the Welsh they use and some acknowledge a fear of getting things wrong in more 'formal' situations (eg tax online, or not knowing a particular word in Welsh when talking by phone).

Phoning...[energy company name] I wouldn't have spoken Welsh to them because I wouldn't have felt confident and especially not knowing what I was asking about, the smart meters, so I prefer to speak English. (Welsh speaker from Porth)

I spoke in English as I felt I had more confidence in asking about something I had no knowledge of [and Welsh was not offered]. (Welsh speaker from Wrexham)

Having spent time viewing Welsh language pages online during the discussions, some Welsh speakers acknowledge that this perception of web pages containing difficult Welsh words may not entirely be the case in reality.

It was fine actually, so maybe it's habit more than anything, because I do it, and it was easy to understand. . . . It was just as easy to find the Welsh form. . . . Yeah it was clear, and what I find, when they [service providers] translate stuff they over-complicate stuff, they go for a very formal language, but no [not here – Dŵr Cymru]. (Welsh speaker from Cardiff)

Some participants in the focus groups also point out how it can feel awkward if they attempt to begin a conversation in Welsh but find that the person they are talking to does not speak Welsh.

[I use] English [face-to-face] unless there's something on the till saying 'Start every conversation in Welsh' or 'Welsh service here'. Unless there's an indication I probably wouldn't start a conversation in Welsh to avoid causing embarrassment to someone because when people have to say 'I'm sorry I don't speak Welsh' it's awkward. (Welsh speaker from Carmarthen)

A further example shows how Welsh speakers can be affected by a less than positive experience: a Welsh speaker in North East Wales recalled how he spoke in Welsh to a bus company employee about travelling to the Eisteddfod. The tone of the employee's response made the Welsh speaker think twice about using Welsh in the future.

We were going to catch a bus and we went to the office and asked what time is the bus to the Eisteddfod in Welsh, because we expected, with the Eisteddfod being on. 'We don't speak Welsh' (said crossly) and a lot of that sort of attitude. That happens quite a lot I must say. It makes me sad and it makes me think twice about using the language, even things like 'Diolch'. (Welsh speaker from Wrexham)

This example highlights how a lack of awareness and appreciation of the significance of the language for Welsh speakers in their interactions with services has a negative impact on their experience with the service provider and potentially more widely.

Previous experience and low expectations of service quality also add to habits in service use. Focus group participants noted that, on occasion, they still chose the English option based either on experience or perception that this service will be better than the Welsh language option. Occasionally, Welsh speakers believe that English language versions of websites are more likely than Welsh language versions to be accurate and up to date:

If you knew the content was OK [I would use Welsh web pages]. When I'm at work and I need to do something quickly and I only have five minutes I'll go to the English site because the Welsh site could be lagging behind - unless I have time to translate that as well. So if I want information that's both current and accurate I'll go to the English. (Welsh speaker from Carmarthen)

Research and commentary on Welsh language services suggest that where services are available in Welsh, they tend to be provided in English as a default. If these are the circumstances in which Welsh speakers are making language choices when using services, then applying the theory of behavioural economics to this context, it is reasonable to conclude that these circumstances are influencing the language choices of users and have led to a habit of using services in English. As suggested in 'MindSpace', this may well be true even amongst users whose intention or preference would be to use services in Welsh. Behavioural economics also tells us that habits are not only formed on an individual level, but that 'When

*replicated across a community or society we call them culture*³⁹. On this basis, it seems possible that the circumstances within which some services are currently delivered in Welsh as indicated above, may be encouraging the use of services in English as a social norm:

Research commissioned by the Welsh Government in 2013 identified that *'Habit, along with confidence, appeared to play a key role in preventing some participants from using the Welsh language online on a regular basis... English was considered the default language online and was an ingrained behaviour'*⁴⁰ Such findings are not limited to online services.

It is clear from numerous initiatives that habits can be changed. Even where those habits are widely established, interventions can reverse them. The introduction of a 5p charge for plastic bags in Wales is an example of a large scale intervention successfully changing widespread habits through legislation.

However habits are ingrained behaviours which often result from subconscious decision making, which can make them difficult to change. The first step to changing subconscious decision making, according to behavioural economics, is to raise people's awareness of their decision making, so that those decisions are taken consciously. When people think about their decisions, influence can be exerted in order to change those decisions, for example through the sharing of information.

This is the context to one of the Welsh government's current initiatives 'Pethau Bychain' (the little things) to raise people's awareness of the daily language choices they make, for instance when using social media, choosing the Welsh language option at a cashpoint, or changing phone or browser settings to Welsh.

This alone, however, is unlikely to deliver fundamental changes in Welsh speakers' behaviour. Although it may pave the way for changing their habits, other interventions are vital and the way in which services are offered and provided are key to this.

*"Government departments, including both ministers and civil servants, should consider how the use of Welsh can be made normal and obstacle-free. Until this is achieved, the uptake of Welsh services, available largely on request, will continue to be limited"*⁴¹.

It would therefore seem reasonable to argue that consumers may require a nudge to start using services in Welsh, where they have previously used services in English.

The development of a new statutory framework for the provision of services in Welsh provides an opportunity to address this problem, by ensuring that all providers are better equipped to

39 'MINDSPACE – Influencing Behaviour Through Public Policy' - Cabinet Office p77

40 Exploring Welsh speakers' language use in their daily lives (Beaufort Research 2013) p17

41 Dyfodol i'r Iaith evidence to the European Charter for Regional or Minority Languages' Committee of Experts (April 2013) – p6

meet the needs of Welsh speaking consumers by offering an active, clear choice of services in Welsh and in English.

It is unclear as yet whether all organisations subject to the service delivery standards will be required to provide all or only some services currently provided in English in Welsh also. One thing that is clear, however, is that if a full a range of services are provided in Welsh in future in accordance with standards, that provision would be undermined by a continued delivery of services in Wales which assumes the provision of services in English as a default. The current provision of Welsh language services in a non-active (or passive) way presents a barrier to service use which must be addressed if the service delivery standards are to achieve their aims. It is therefore vital that the implementation of this new framework, together with the accompanying codes of practice, set out not only what to provide in Welsh but also how to provide it.

Conclusions

We believe that a lack of awareness of a Welsh language service offer and the absence of a Welsh language service are more significant barriers to using Welsh than a preference for using English. A lack of visibility / audible indications of services and the absence of an active offer of services in Welsh is a key theme to emerge from our research. If an interaction starts in English, it tends to continue in English.

A lack of service provision in Welsh or an issue around its delivery can result in negative perceptions. A lack of consistency with the offer can be a source of dissatisfaction. This can impact negatively on a consumer's perceptions of a service provider.

Our research has also highlighted how some Welsh speakers tend to use English as the default language online, sometimes without making a conscious decision about which language to use. Having to seek out or 'opt in' to a Welsh language service serves as a deterrent to take up of Welsh services.

Language use habits formed over time are also considered by some to be a barrier to making more use of the Welsh language when interacting with service providers. The lack of opportunity to use Welsh on a regular basis impacts on some Welsh speakers' propensity to use Welsh when accessing services from these types of provider.

A lack of language awareness or sensitivity on the part of staff members can impact negatively on consumer experience and also deters future use of Welsh on the part of the consumer.

In the implementation of the new Welsh language standards, service providers need to consider not only what to provide in Welsh but how to provide it.

3. Defining a Good Service for Welsh Speakers

The extent to which Welsh speakers are engaged in the design of services

Our research clearly shows real barriers to take-up of Welsh services amongst fluent Welsh speakers, both cultural and behavioural, but respondents also told us what would improve services offered through the medium of Welsh. Therefore it is vital for service providers to gain an understanding of these issues.

In this section we consider how service providers seek to take account of the views, needs and preferences of Welsh speakers to inform their provision through consultation, engagement and other appropriate means and where there may be scope to develop this. A clear principle of a good service is one that listens to its customers and is designed and built around their needs. We believe this should extend to Welsh language provision.

In terms of the service provider's perspective on Welsh language services, many welcomed the opportunity offered by our research to express their support for the use of Welsh and to share their achievements in meeting the language needs of Welsh speakers.

Several organisations reported that they had voluntarily committed to provide services in Welsh, some having formalised those commitments within a voluntary Welsh language scheme or policy. A number of other service providers duty-bound to provide services in Welsh cited that they had gone, or desired to go beyond their statutory duties, by taking action to promote the use of their Welsh language services. For example, one organisation described itself as '*....keen to consider how it can go beyond its statutory duties and provide services in Welsh which add value to the customer's experience.*'

However in terms of formal engagement with Welsh speaking consumers, there is very little evidence of planned or systematic activity with the aim of improving Welsh language services.

Some examples of good practice were identified; however, these were mainly within the public sector and directly linked to requirements attached to Welsh language schemes. Denbighshire County Council recently launched a review of its Welsh language services and in doing so actively sought the views and experiences of Welsh speaking service users by means of a survey. Some other service providers referred to having consulted occasionally with organisations representing Welsh speakers, as a means of engaging Welsh speakers in the design of services. For example, during a recent process of centralising some health services in south Wales, consultation was held with 'Mentrau Iaith'⁴² and 'Merched y Wawr'⁴³ on how

42 'Mentrau Iaith' translates as 'language initiatives'. They are Welsh Government funded organisations that help communities to increase and develop their use of the Welsh language

43 'Merched y Wawr' is a national association of women in Wales operating in the Welsh language

best to provide services in Welsh following this process of change. However, most providers who responded to our survey acknowledged that they had very limited discussions with the public about Welsh language services, or none at all. Whilst a number of service providers referred to arrangements they had in place to engage the public in the development of services generally, Welsh language services were rarely if ever discussed specifically.

Several providers welcomed our research, as a source of information that would be useful to them. One organisation stated that they needed

'...credible research from Welsh language speakers about why they use / don't use Welsh language services (along with an outline of what they need / expect).'

However this desire to understand the needs of Welsh speakers was limited and most service providers either did not see the need for such research or did not see it as a priority. One provider noted:

'It is felt that the requirements of Welsh speaking consumers do not differ from those of non-Welsh speaking consumers.'

Another noted that it did conduct research into the:

'needs of vulnerable and specific groups of customers, but not Welsh speakers'.

Some providers commented that it was not their responsibility to seek to understand the particular requirements of Welsh speaking service users. One mentioned that it is the Welsh Language Commissioner's responsibility to reflect the voice of Welsh speaking service users within the advice she provides, and that no direct engagement with Welsh speakers was therefore necessary by service providers themselves.

Despite this lack of research into the needs of Welsh speakers and engagement with them, most service providers were seen to have a process in place to assess the impact of new services on Welsh speakers. Some did so as part of their equality impact assessments, whilst others had bespoke processes in place. The way in which assessments were carried out varied significantly. Some service providers provided training and guidance for staff members on how to assess the impact of their services on Welsh speakers in particular, with arrangements in place to monitor the quality of the assessments made. However, many providers acknowledged that the arrangements to consider the needs of Welsh speakers within the design of services were not as systematic or as thorough as the arrangements in relation to other specific groups. Welsh language impact assessments were often reported to be carried out by staff with little or no knowledge of Welsh language matters, with no support or advice available on how to conduct them properly.

Many service providers emphasised that public consultation and engagement was always conducted bilingually, so as to offer Welsh speakers an opportunity to express their views on the relevant subject matter. This was considered by some an adequate means of engaging Welsh speakers in the design of services. We would argue that this approach is too general and does not reflect an appreciation that a Welsh speaker's experience may not mirror a non-Welsh speaker's experience in terms of perception, confidence and trust. In order to gain valuable information on the most effective and efficient way of providing services under any new requirements we are of the opinion that service providers should engage with Welsh speakers not only at the start of the process, but on an ongoing basis to help monitor progress and identify and address issues of concern. Welsh speakers should also be involved in helping to design services in order that they will better meet their needs and take account of the barriers they may face in accessing these, and in testing any new Welsh provision to identify how accessible and visible this is before services are rolled out. Creating services that have had input from the people who will use them from an early stage would arguably increase usage of such provision.

Service providers should also consider rather than including a Welsh speaker in an English speaking focus group, establishing a Welsh speaking focus group that will inform the development of policy, the design and provision of services through the medium of Welsh and ensuring that they are regularly actively seeking feedback from a range of different Welsh speakers, who as our findings have highlighted, have a range of views and preferences in terms of their usage of Welsh language services. As outlined below, mystery shopper exercises are another useful form of feedback and can provide real benefits in measuring the visibility, accessibility and quality of Welsh language service provision.

Greater appreciation amongst providers that Welsh speakers have a right to services in Welsh should, in theory, lead to better services. On this basis we feel that a change in the approach by service providers may be a fundamental prerequisite to improving the use and availability of Welsh language services. But certainly within the context of low take up reported by providers of some services it is important that providers engage in an informed way appreciating those barriers reported by Welsh speakers in accessing Welsh language services and actively consider how to address this. It is key that Welsh speaking service users from a range of backgrounds are involved in this work.

The extent to which feedback is sought on Welsh language services

We would argue as part of gaining a better understanding of consumer views of a provider's services, seeking regular feedback from Welsh speakers is also key. We did find some evidence of providers actively seeking feedback on their Welsh language service

Case study: Denbighshire County Council seeking feedback from Welsh speakers

Following a review of their Welsh language services where Welsh speakers were asked for feedback, the Council commissioned a mystery shopper exercise by Menter Iaith Sir Ddinbych. The Council subsequently introduced an Action Plan as the survey had highlighted the need to ensure that staff respond bilingually to both calls and correspondence, and that all correspondence on social media is bilingual.

Generally, however, service providers actively seeking feedback on their Welsh language services were in a minority, and no service providers reported they were doing so routinely. Typically, service providers were seen to rely on complaints as the predominant or only source of feedback on the services provided in Welsh. One organisation noted that *'Feedback on services is routinely sought, but not specifically in relation to Welsh language services.'* Another noted that it *'...does not proactively seek feedback on its Welsh language services but based on the low number of complaints received it is presumed that customers are happy with the services provided in Welsh.'* It is widely recognised that complaints alone do not provide an adequate or accurate measure of satisfaction with services as any information gathered always has a certain measure of unknown dissatisfaction. A recent study showed of those who do want to complaint about public services, 39% don't do so⁴⁴. Therefore a lack of complaints about Welsh language services should not be taken as an indicator of satisfaction. In the context of Welsh language services, the information gathered suggested that few service providers had any other arrangements in place to receive feedback from the public.

This lack of feedback on the delivery of services in Welsh is likely to compound the lack of understanding of the needs and preferences of Welsh speakers resulting from the lack of engagement with them within the design stage of services. Without feedback, service providers cannot know whether or not their Welsh language services are meeting the needs of their intended users, whether barriers exist to the use of services in Welsh and what those barriers might be. One organisation acknowledged that *'...it is not always clear what the barriers are to the use of the Welsh language'*.

Some providers commented that take up of their Welsh language services was lower than expected but none of those service providers were found to have investigated the reasons for that. Rather they tended to presume that some Welsh speakers simply favoured the use of services in English. As our research has shown, there is a preference for services in

44 More Impact for more people. 2012. The Parliamentary and Health Service Ombudsman for England.

Welsh amongst some fluent Welsh speakers, highlighting the need for providers to seek out the reasons for the language choices made by Welsh speaking service users and gain an understanding of the barriers to the use of services in Welsh.

Case study: Scottish Power customer engagement

As part of a general customer survey, Scottish Power asked customers in Wales for feedback on their Welsh language services specifically. Such a move recognises the fact that customer needs in terms of Welsh language services do not always mirror customer service needs generally. Developing Welsh language services in consultation with Welsh speakers may give better returns on investment in those services.

The benefits of providing a good Welsh language service

We asked Welsh speakers who took part in our survey whether they agreed or disagreed with a series of statements relating to the impact of an organisation offering a good Welsh language service on customers' perceptions of that company. Agreement was high that there are positive commercial effects in terms of attracting and retaining Welsh speaking customers from doing so:

- Having a good Welsh language service **helps a company stand out**' (94 per cent agree)
- 'Being able to deal with organisations in Welsh **makes me feel valued as a customer**' (90 per cent agree)
- 'I'm **more inclined to stay a customer** of a company that provides a good Welsh language service' (83 per cent agree)
- 'I'm **more inclined to choose a company** that provides a good Welsh language service' (82 per cent agree)

At the same time, eight in ten Welsh speakers interviewed (80 per cent) were of the opinion that the service providers we focussed on in our research 'don't do enough to cater for the needs of Welsh speaking customers' at the moment.

Reflecting these survey findings, some Welsh speakers in our focus groups told us that using Welsh when dealing with service providers enhances their experience and impression of the organisation. Some participants noted they were 'extremely satisfied', or 'very satisfied' to sum up their view of the experience as a Welsh speaker of Royal Mail's active offer of Welsh language services by phone for instance.

Fantastic! . . . The option was Welsh first, and then the woman said 'Welcome' in Welsh. Straight through in Welsh. 'Anything else I can help you with?' Over in a couple of minutes. (Welsh speaker from Cardiff)

In other examples, some focus group participants were seeking to complete a 'homework' task by contacting Parcelforce . Having Googled 'Parcelforce contact number', and clicked on the 'Contact us' link in the search results, they were taken directly to a page which includes a Welsh language helpline option. These Welsh speakers were very happy to find this option and the experience was 'excellent', especially for some who commented how they find it easier to express themselves in Welsh. It left some Welsh speakers with a positive view about the company, and feeling valued.

Google search engine: 'Parcelforce contact number easy to find. Chose Welsh speaking number out of a possible three choices. Was connected/ answered within 10 seconds. Very polite and helpful, excellent service. Full satisfaction. I am a Welsh speaker and am more comfortable in my first language. I felt because I chose Welsh I was 'special' and was dealt with straight away. (Welsh speaker from Caernarfon)

In another example, a participant also described how their retail experience was enhanced when the service provider, on realising that they spoke Welsh, switched to Welsh for the face-to-face conversation. This level of customer service and language awareness indicates to the Welsh speaker that the business very much values the individual and their needs as a customer.

I'm in a shop and I've been dealing with someone in English and then they realise that I speak Welsh and they change to Welsh - I appreciate that. . . . If someone changes to Welsh, they care about what I want, they're thinking about my needs. (Welsh speaker from Carmarthen)

Summing up, Welsh speakers on occasion believe that providing an active offer is likely to 'broaden the customer base' as well because Welsh speakers would want to be able to use the service provided by the organisation.

Just to remember that it's the customer who has the power to go back there again or go to another shop. . . . That's it and I do that quite often. (Welsh speaker from Wrexham)

Case study: Wales Millennium Centre website

The Wales Millennium Centre website is consistently bilingual, with a Cymraeg/English button on all webpages to toggle between languages without reverting to the home page each time. On English language pages there is a prominent banner alerting consumers to the existence of Welsh language content, an attempt to counter a lack of awareness of Welsh language services. Welsh language pages display a similar banner thanking consumers for visiting Welsh language pages, giving a clear indication to Welsh-speaking consumers that the organisation supports the Welsh language.

How Welsh language services can be improved

Most service providers in our research acknowledged there was room for improvement of their Welsh language services and many were keen to report practical steps they had taken, or they could take, to improve services for Welsh speakers.

Positively, some providers such as the police, for example, explained to us that providing services in Welsh was considered intrinsic to their remit of protecting and promoting the rights of citizens. However, the responses by service providers to our review indicated that this type of rights-based approach to the provision of services in Welsh, which the Welsh Language Measure seeks to establish uniformly, was seen to be the exception at present, not the norm. Another provider told us *'providing services in Welsh is not only a statutory requirement. It is seen as part of the company's corporate social responsibility.'*

In our survey of fluent Welsh speakers, when asked what, if anything, they would like companies such as their bank, gas, electricity, phone, television or broadband supplier to do to improve the Welsh language services they provide to customers in Wales, the primary suggestion made was to offer the option of a service in Welsh (see figure 12). This was suggested by over a third – 35 per cent – of Welsh speakers interviewed overall, but was highest (at 41 per cent) amongst the 16 to 34 year old age group. It was also particularly high amongst people who usually interact with their bank via a website or app (at 39 per cent), which reinforces that bank / building society online services are a particularly weak area in terms of Welsh language service provision.

The next most popular suggestion was to promote or advertise the existence of Welsh language services more, so that Welsh speaking customers are aware they are available. Whilst just over one in five overall (21 per cent) suggested this, the proportions of those living in South East Wales and those in the 16 to 34 age group saying this were particularly high (at 35 per cent and 32 per cent respectively). This emphasises the importance of promoting the

availability of services and giving visual cues such as badges or signage in areas where Welsh is not the dominant language. This is emphasised by our finding that nearly nine in ten Welsh speakers (88 per cent) agreed with the statement that ‘Welsh language services on offer aren’t advertised or promoted enough to customers’.

Other suggestions for improvement included:

- more consistency in the provision of Welsh services across channels
- more use of clear, every-day, ‘normal’ Welsh in communications
- providing forms, bills and letters bilingually to customers
- making an active offer of Welsh, that is by starting a conversation with a greeting in Welsh or offering a choice of language when contact is made
- giving Welsh equal status with English
- providing staff with better training in Welsh

Some service providers who responded to our survey reported having taken steps to address difficulties they had experienced in appointing sufficient numbers of Welsh speakers to provide services in Welsh. Notably, one organisation had worked with the charity ‘Chwarae Teg⁴⁵’ in order to attract Welsh speakers to apply for positions within the organisation. Another reported to have invested significantly in language training for members of staff who could speak Welsh but lacked confidence to communicate with the public in Welsh in a service delivery context. One barrier to the use of services in Welsh referred to by respondents was the inability of IT systems to record the language needs and preferences of service users. Health organisations mentioned that efforts were being made to change a national patient information records system so that the language needs and preferences of service users could be recorded. Clearly, despite the general lack of understanding of the experiences of users of their Welsh language services, some providers at least recognise the need to improve services and evidence was seen of practical measures being taken to achieve that.

Evidence was also seen that some organisations who responded to our survey were aware that services were not as easy to access in Welsh as in English and that steps were being taken to change that. Some providers of energy services noted that they now provide all bills in both Welsh and English to all customers in Wales, whereas they had been provided in English previously and were available in Welsh only on request. Another noted on a practical level that providing bilingual bills was a more cost-efficient approach. Some local authorities mentioned a similar change of delivery from providing the content of their websites in English as a default to providing all users with a clear and equal choice of content in Welsh or English from the outset. These efforts to provide a more active choice of a service in Welsh show some appreciation amongst providers that the provision of services in English as a default may not be an appropriate means of delivering services in Wales.

45 ‘Chwarae Teg’ is a charity which helps ensure that women in Wales can enter the workplace, develop their skills and build rewarding careers

Generally, however, the information gathered showed an inconsistency in how Welsh language services are delivered, even within individual service providers. For example one local authority reported that *'A splash page offers a proactive choice of content in Welsh or English on the council's website and the site remembers the language choice of the user. The same proactive choice of a service in Welsh is not offered in other service contexts....'*

Case study: Cardiff Council twitter accounts

Cardiff Council maintains two main twitter accounts, an English language account and a Welsh language account. Both tweet the same content in their respective languages, and deal with enquiries from the public during office hours, offering complete parity between the two languages. The Welsh language account is promoted within the Welsh language twittersphere, and occasionally mentioned on the English language account in order to raise awareness of the service.

Numerous examples were noted of efforts to raise awareness of Welsh language services and to promote their use, suggesting that providers recognise that service users may not always be aware of the availability of services in Welsh. One provider's sponsoring of a Welsh language television programme allowed for the promotion of the number for their Welsh language telephone service.

Several service providers reported to have conducted activities to promote their Welsh language services within the National Eisteddfod, including encouraging visitors to register to receive services in Welsh. It was also noted that some service providers had sought assistance to promote their Welsh language services through the activities of other organisations, such as the Welsh Language Board and local Mentrau Iaith.

Some such initiatives had led to an increase in the use of the Welsh language services promoted. The use of badges worn by staff to indicate their ability to communicate in Welsh was reported by several service providers with significant enthusiasm as an effective means of raising awareness of the availability of their services in Welsh.

The view was frequently expressed that improvements to Welsh language services would be difficult to achieve without assistance. Some providers appealed for support to improve their services for Welsh speakers and several references were made to the need for collaboration as a means of sharing good practice. For example, one organisation noted that it *'would benefit from the sharing of good practice between providers in terms of the provision of services in Welsh, for example through a purposeful forum'*. Another mentioned that it would require *'greater assistance from the Welsh Government, who could act in a 'facilitator' capacity to promote collaboration and usage of the services'*.

Important aspects of a Welsh language service

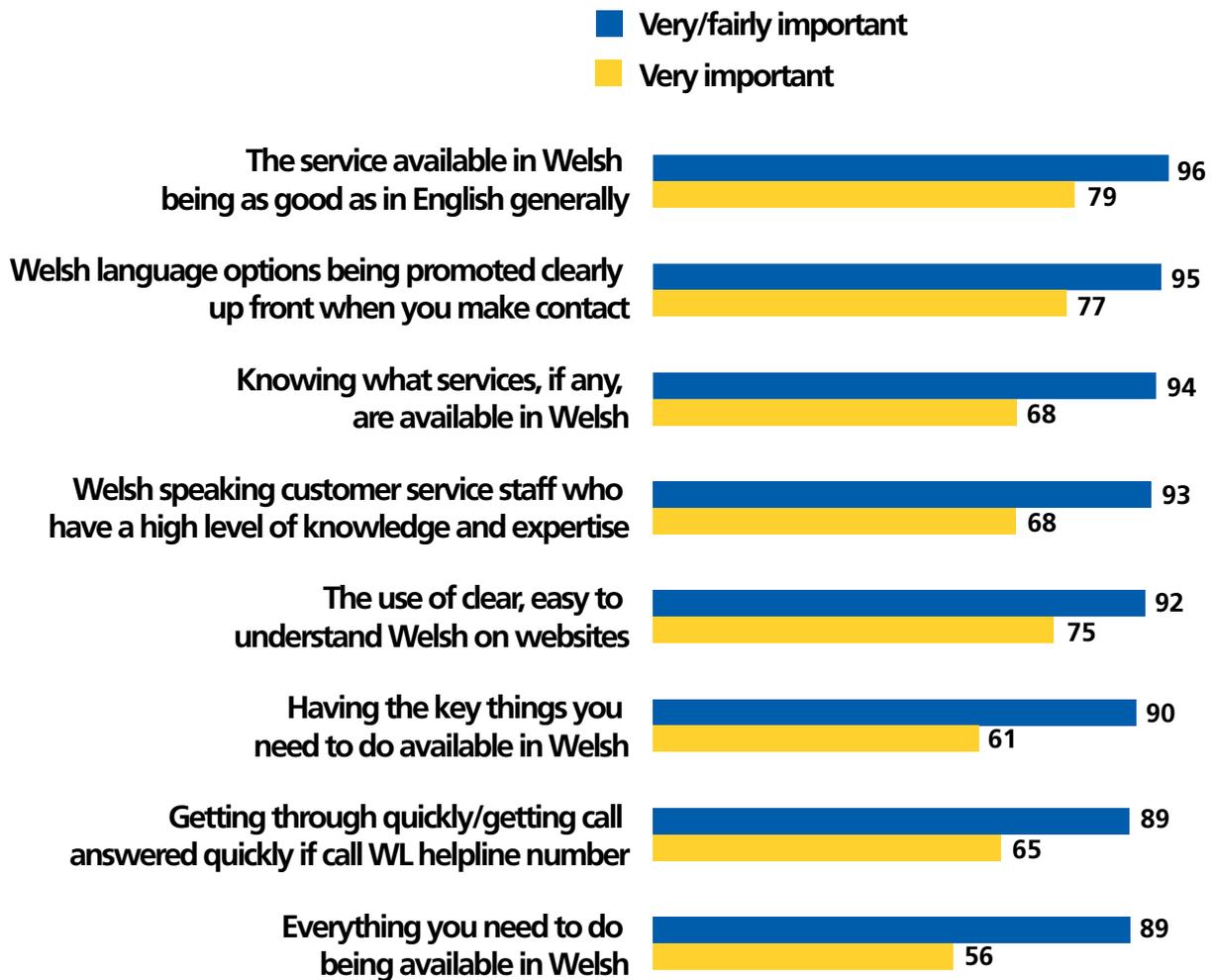
In our survey of Welsh speakers, we prompted respondents with a list of aspects of a Welsh language service provided by organisations such as banks, gas, electricity, phone, television and broadband suppliers and asked how important each was to them personally.

While all of these service dimensions were regarded as being important by the vast majority of fluent Welsh speakers interviewed, those which emerged as most important (that is, that were considered to be very important by over three in four people) were:

- 'The service available in Welsh being as good as in English generally' (rated as 'very important' by 79 per cent overall)
- Welsh language options being promoted clearly upfront when you make contact (rated 'very important' by 77 per cent)
- The use of clear, easy-to-understand Welsh on websites (rated 'very important' by 75 per cent)

All other attributes were felt to be very important by between around six in ten to seven in ten of the sample (see figure 12 below):

Figure 12: Importance of aspects of Welsh language service (%)



Base: All (505)

Feedback from the focus groups provides more depth on the three key areas above for defining a good Welsh language service.

The service available in Welsh being as good as in English generally (rated as 'very important' by 79 per cent overall)

The types of attribute associated with any kind of service provision are required of a service provided in the medium of Welsh, for example:

- easy-to-find contact details
- not having to follow too many automated steps before speaking with someone

I went through a lot of menus 'press 1 for . . .' a lot of hassle. About six minutes on the phone to get through to speak to someone on the phone. (Welsh speaker from Cardiff)

- not having to wait too long for the phone to be answered

I hate when you ring, and you ring like an 0870 number or whatever and it goes through a lot of [recorded] stuff first [like] 'if you want more information you can find it on our website'. If I wanted to do that I would have done it, you know? It just takes ages. (Caernarfon Welsh speaker)

- speaking to someone who is able to answer your query
- the query being resolved quickly and not having to repeat the reason for the call to different people
- courtesy and friendliness from the person answering the query

The most important thing is courtesy and it means a lot of different things. I don't like to feel that I'm too much bother to talk to because I'm here for a reason. I want to talk about something or other. (Welsh speaker from Wrexham)

Welsh language options being promoted clearly upfront when you make contact

(rated as 'very important' by 77 per cent overall)

In our survey, over nine in ten Welsh speakers (93 per cent) agreed that 'I'm more likely to use a Welsh language service if it is offered up front'.

During our focus groups, Welsh speakers also told us the Welsh language option of a service should be prominent through whichever channel is being used. When a Welsh speaker looks online for the information, for example, the Welsh language options should be visible via the website directly or via Google search terms as sub-links to the main search result. By phone, the Welsh speaker should be asked if they would like to continue in Welsh. Some consumers describe using the phonebook and Yellow Pages to find phone numbers.

They need to make it more obvious that it's available, like that front page to say it's available, instead of having to look for it, and default to the English. So it sends the message. (Welsh speaker from Cardiff)

The option at the beginning of every call. Making it foolproof. You can't overestimate how much difference just clicking a button makes. When people want to accomplish something you mustn't place any obstacles in their way – remove all barriers. (Welsh speaker from Carmarthen)

[I found the number] in the phonebook, 08456011511 – [it took] seconds, after choosing the right option. Simple and clear. Very satisfied. (Machynlleth Welsh speaker)

Case study: HSBC telephone services

HSBC offers a dedicated Welsh language telephone line for customers wishing to discuss their business through the medium of Welsh. However, the Welsh language telephone number is not advertised on the company's main contact web page, meaning that customers may be unaware that it offers such a service and it is an opportunity lost for the provider in promoting a valuable service.

Some Welsh speakers believe that knowing in advance of making a phone call that the person they would speak to is a Welsh speaker ('guaranteed'), would also encourage more use of the Welsh language.

That there is someone at the end of the line – guaranteed who speaks Welsh on the phone with me. Instead of me doing something through Welsh, and find out 'Oh I don't speak Welsh or whatever'. You have to go through the blurb again then in English. (Welsh speaker from Machynlleth)

Some Welsh speakers in the focus groups would like to see more use of badges, signage or 'start every conversation in Welsh' signs in a face-to-face context with service providers which identify Welsh speakers and permit Welsh speakers to use their preferred language from the start. This method is 'better than asking' which can cause 'awkwardness'. Some Welsh speakers suggest that in a face-to-face environment it should be easy for people to know before or on entering a premises that there are Welsh speakers available. An example was given of entering a shop in Pembrokeshire and seeing a prominent sign which stated that Welsh was spoken in the shop.

If someone speaks Welsh in a shop or business, they should put it on the door or something. People look these days for scores on the doors – cleanliness etc, what about something about speaking Welsh or to say someone is learning Welsh and badges on the staff as well. (Welsh speaker from Porth)

Some providers offer a Welsh language helpline on their 'Contact us' page. However, it cannot necessarily be taken for granted that it will be noticed by Welsh speakers. If it is not displayed prominently and with English being the dominant language used online it can't be guaranteed that everyone will notice it.

*For me, if I go online, on the website to look for something, most of the time anyway, I use English because I can't read the Welsh properly but if I'm talking on the phone I prefer to speak Welsh, so I hadn't noticed this thing about the Welsh phone number [on the Post Office site]. If I'd seen that, I'd think – oh good, there's a Welsh line - but most of the time when I'm looking for things, I look in English.
(Welsh speaker from Wrexham)*

An active, equal offer of Welsh alongside English conveys to some Welsh speakers that the organisation providing the service 'respects' the Welsh language and sees it as important. Some point out that the active offer should ensure that the Welsh language option is just as easy to choose as the English option.

*The problem to start with is does a company take the Welsh language seriously. If they've got a Welsh service set up, on the phone or the website, they should say – do you want the service in Welsh?
(Welsh speaker from Porth)*

Where an active offer of the Welsh language is present, Welsh speakers in the focus groups tended to choose this option. This choice is made providing they do not have any negative expectations of the quality of service provided in the Welsh language (e.g. having to wait longer to speak with someone or less up to date content online) and that, for some, the topic of the query is not too technical or formal (e.g. tax).

*If you phone a company up and they say 'Bore Da' or 'Prynhawn Da' and they speak Welsh, you automatically speak Welsh back.
(Welsh speaker from Porth)*

*I had the option to do the call in Welsh straight away, by pressing 2, and then my call was answered after three rings. Answered the question straight away, and was professional and asked if there was anything else he could help me with. I used Welsh because the option was given to me straight away. I was very happy with the experience.
(Welsh speaker from Cardiff)*

*If they speak Welsh to me, I speak Welsh back without thinking, so same with a business. If they gave me a Welsh option without me expecting it I would probably take it.
(Welsh speaker from Carmarthen)*

Reflecting on her experience of contacting Royal Mail by phone (08457 740740) one Welsh speaker taking part in the focus groups describes how she was given the option to speak Welsh from the outset, and that the experience was smooth, efficient and friendly. Some Welsh speakers highlighted how they like the way in which the Royal Mail phone option offers Welsh first so that even if they were in a rush and choosing the option offered first, it would still be in Welsh.

*I think [Royal Mail] is an example again of how quickly you want the service. It saves time – boom – Welsh first.
(Welsh speaker from Carmarthen)*

Providing a bilingual splash page online means that the Welsh speaker can choose his or her preferred language before moving on and without any additional steps to take. Our research has highlighted that, even where a Cymraeg button is visible on a webpage, Welsh speakers will sometimes stick with the English language if that is the language used when they reach the site (e.g. via a search term).

*Some kind of an option from the start. . . . Often there are two buttons, and then you open it. . . . Yeah, like go into the website through Welsh, or go to the website through English.
(Welsh speaker from Cardiff)*

*Most of the local authorities they offer both languages. So it's easy enough and that's what I think should happen with companies like...[energy company name].
(Welsh speaker from Cardiff)*

When a bilingual service is offered online, for example via a splash page, some Welsh speakers in our research make the point that the promise needs to be fulfilled on entering the site with all the content in Welsh. 'Equal attention' should be given to both languages, (e.g. forms being available in both languages).

However, an active offer via bilingual splash pages appears to rely on Welsh speakers accessing the site via this landing page. This does not necessarily happen in reality, for example with some Welsh speakers in the groups clicking on links below the main search engine result to try and reach the relevant page more quickly (for example 'Contact us'). On reaching English versions of the pages they continued to use the site in English. Some reported not noticing the Cymraeg button because they are focused on answering their query.

*I didn't see a choice though for Welsh actually. So maybe I would have gone for something Welsh but I didn't see a choice - and I was happy with the English one.
(Welsh speaker from Caernarfon)*

In one group where some Welsh speakers experienced this outcome, they were left feeling that the Welsh language was not being given equal status by the organisation. This is described as 'disrespectful'.

*I felt it was second [the Welsh language], but maybe that was the way we searched. . . . We had the same, it is disrespectful. . . . It's like a default to the English.
(Welsh speaker from Cardiff)*

More generally, as discussed earlier in this report, it is not always the case that when the service is actively offered in Welsh, Welsh speakers will use it. Some Welsh speakers choose English in such situations because it is their habit over time to use English in such circumstances.

*I'd still use the English [web pages] I think because in my everyday life I use English more than I use Welsh, so you just do it automatically.
(Welsh speaker from Carmarthen)*

Case study: DVLA online service

The DVLA offers the facility to pay vehicle tax online through the medium of Welsh on www.gov.uk. This goes beyond providing static website text in Welsh, since consumers can complete forms in Welsh and receive a Welsh language service online. However, the Welsh language pages are not easily found, meaning that consumers who would wish to use the Welsh language service may well be unaware that it exists. A nudge towards the Welsh language pages from the English language pages would raise awareness about the service.

The use of clear, easy-to-understand Welsh on websites

(rated 'very important' by 75 per cent)

Emphasising the point that any Welsh used in customer-facing communications needs to be clear and easy to understand or it can act as a barrier, nearly eight in ten Welsh speakers (79 per cent) agreed with a statement that 'If the Welsh is too formal or technical, it puts me off dealing in Welsh'. The proportion agreeing with this was highest amongst older Welsh speakers (that is, those aged 55 and over).

Some Welsh speakers in the focus groups believe that a good Welsh language service needs to highlight that the service is delivered in straightforward, 'simple' Welsh, avoiding too many technical terms. It should feel 'natural' to the customer. This attribute is mentioned for both online and phone methods of interaction.

Like the language to be more modern, like young people like us, buying houses, we have to research into what deals, and this and that, so if the language kept up with us, like more verbal Welsh, easier to understand. (Welsh speaker from Caernarfon)

In terms of the concerns raised over technical or formal language online, some suggest that websites could do more to help Welsh speakers. A hyperlink, for example, could be used to translate a word; or a function which translates individual words on the site when the mouse hovers over the word. This type of tool could give a Welsh speaker 'more confidence'.

It would help if you were on a Welsh website and there was a tool there that allowed you to hover over a word you didn't understand and the English word or synonym came up. That would give me more confidence than that I'd understood. (Welsh speaker from Carmarthen)

A further suggestion was for live chat through the medium of Welsh to be available alongside the English language option.

In addition to raising awareness of Welsh language services in order to dispel any concerns and fears that they may be less accessible and consumer friendly, service providers should also involve users in the design of services. Including Welsh speakers at the outset and testing the language used on websites for instance, will ensure that it is appropriate and accessible.

In other feedback from the focus groups, some Welsh speakers told us that they are looking for consistency in the Welsh language across services. As noted earlier in this report, our focus group research found that Welsh speakers may experience good customer service with an organisation through the medium of Welsh via one channel, but not so with another.

Consistency also needs to be present within a single contact experience. Welsh speakers may, for example, speak in Welsh with the first person they deal with from the service provider, but then be routed to a non-Welsh speaker.

In terms of forms and information, some Welsh speakers in the focus groups told us they prefer to complete Welsh language versions of forms (whether paper based or online) but like to have the English option also readily accessible if they need to check certain terminology. Completing a form in Welsh also gives Welsh speakers the opportunity to give thought to what they are writing, 'and there is time to look at it'.

I write it in Welsh, but I check it then in English because of a lack of confidence. . . . I do that, and check the English too, just to make sure I understand. . . . It's just because we're not sure of the terminology. I see myself as a bilingual person, because that's the way I see the language. (Welsh speaker from Cardiff)

Finally, some Welsh speakers noted that they do not expect 'UK' businesses such as multiple retailers to provide a full bilingual service online, for example, but do expect genuine efforts from the businesses to use Welsh at a local level, for example with signage and with staff who can speak Welsh offering to speak with customers in Welsh. These types of action can indicate that the service provider takes the needs of its Welsh-speaking customers seriously.

Perhaps in the shop itself [large retailer] I expect a level of bilingualism, on the big banners or the welcome sign, but not on the website. . . . I've been there with my friends speaking Welsh at the checkout and if they hear you speaking Welsh they'll speak Welsh to you. (Welsh speaker from Carmarthen)

The following example from our focus groups highlights how making a genuine effort with the Welsh language can leave Welsh speakers with a positive impression. On contacting a local housing association, a Welsh speaker was greeted in Welsh and received an explanation that the person they were speaking with was a Welsh learner. This approach demonstrated a genuine respect for the language, according to the Welsh speaker. As a resident in North East Wales, this consumer feels strongly that being able to speak Welsh is part of his identity because his opportunities to use the language are limited.

Over the last month I've phoned the housing association and fair play, every time it's been 'Pnawn da' [good afternoon] and if you start speaking Welsh they say 'Sori, dysgwyr ydw i' [sorry I'm a Welsh learner]; and they're not fluent at all but they still make the effort to speak Welsh and say if you speak slowly, they try. . . . [They're] friendly towards the language, and to me that makes a difference. . . . So for me as someone from Wrexham it's very important that we are accepted as being from Wales. (Welsh speaker from Wrexham)

Conclusions

Generally, service providers are positive in their attitudes towards the delivery of services in the Welsh language. There is acknowledgement amongst service providers that their services are more accessible in English than in Welsh, and some have taken steps to address this. However, Welsh speakers are rarely engaged in the design and delivery of Welsh language services and most organisations are not actively and routinely seeking feedback on their Welsh language services.

Organisations generally recognise some room for improvement of their Welsh language services and some are taking steps to achieve that. Assistance to improve Welsh language services would be welcomed including more collaboration and the sharing of good practice.

Some focus group participants told us that using Welsh when dealing with service providers enhances their experience and impression of the organisation. This is especially the case for Welsh speakers who find it easier to express themselves in Welsh. It can leave them with a positive view about the company, and feeling valued.

Welsh speakers can be left with a poor impression of an organisation if it does not appear that the organisation is making a genuine effort to offer services in Welsh.

The primary suggestion from fluent Welsh speakers for improving Welsh language services is for organisations to offer the option of a service in Welsh. They also suggest that the organisations need to promote or advertise the existence of Welsh language services more, so that Welsh-speaking customers are aware they are available.

The service available in Welsh needs to be as good as in English generally, according to Welsh speakers, for example with phones answered quickly and enquiries resolved efficiently. Welsh speakers would also like an active offer when first contact is made. Where a Welsh option is not offered with equal immediacy and prominence to the English, some Welsh speakers acknowledge that they stick to the default language used first, even if switching to Welsh might only involve a single click.

Our research found that a good service in Welsh also needs to use clear, easy-to-understand Welsh, whether online or by phone.

APPENDIX 1- Methodologies

Beaufort Research

To provide the breadth of feedback necessary to fully satisfy the objectives of this study a combination of research approaches was required.

The methodology for the study therefore comprised both qualitative and quantitative techniques as follows:

Phase 1: a series of extended length deliberative **focus groups** which explored the views of fluent Welsh speakers in depth and provided detailed qualitative feedback and case study evidence. This phase included a pre-task and activities during the discussions, testing the usage of Welsh when accessing services where Welsh is more or less actively offered.

Phase 2: a large-scale **quantitative survey** of a representative sample of 505 fluent Welsh speakers, providing reliable data on attitudes, experiences and behaviours.

The detail on the methods used for each stage of the research is included below.

Phase 1: Focus groups

We began by conducting six extended focus groups with fluent Welsh speakers. All groups were conducted in Welsh. The groups explored their experiences and perceptions of accessing services through the medium of Welsh. The discussions also considered the effect of an active choice of a service in Welsh on the language used by Welsh speakers when dealing with different types of organisation. The impact of a lack of an active offer was also evaluated.

Given the complexity of some of the topics discussed, and also the desire to incorporate some participant activities within the discussions, the focus groups were longer than standard groups and were smaller than normal in terms of participant numbers.

Each group contained five to six participants and lasted for around two and a half hours to three hours. Having smaller numbers taking part allowed us to spend more time exploring individual views and gave more time for the discussion.

The groups were undertaken in separate locations (see table below) to provide good coverage of the diverse linguistic profile of different geographical communities in Wales. They also covered a range of age and socio-economic grade demographics, summarised in the table overleaf:

	Age	Socio-economic grade	Location
1	35-54	ABC1	Cardiff
2	55+	C2DE	Porth
3	18-34	C2DE	Caernarfon
4	35-54	ABC1	Wrexham
5	55+	ABC1	Machynlleth
6	18-34	C2DE	Carmarthen

Recruitment was carried out face-to-face by experienced Welsh speaking qualitative recruiters from Beaufort's field team in each chosen location, working to the agreed specification.

Discussions were free flowing but based around a semi-structured topic guide.

Venues for the focus groups had internet access so that participants could complete a few online activities within the early part of the sessions. Alongside this, prior to coming along to the discussions, participants were given tasks to perform, to assess their language choice when making phone contact with suppliers. These tasks and activities helped explore the influence of an active / passive delivery of services in Welsh on their choice of language use..

Groups were facilitated in Welsh by two of Beaufort's fluent Welsh speaking moderators and all stimulus materials were produced bilingually.

The focus groups took place between 5 and 12 November 2013.

Phase 2: Quantitative survey

The second phase of the study gathered robust quantitative evidence on the attitudes, experiences and views of Welsh speakers on the current provision of Welsh language services.

This quantitative element to the research consisted of telephone interviews with a quota sample of 505 Welsh-speaking adults (aged 16+) across Wales. For the purposes of this research, only those who described themselves as being fluent⁴⁶ Welsh speakers were eligible to take part in the survey.

The sample profile was designed to be representative of fluent Welsh speakers, based on the most recent profile data available from the 2012-2013 National Survey for Wales. Quotas

46 Eligible participants were those describing their ability in spoken Welsh as 'fluent in Welsh' based on the following options: 'I'm fluent in Welsh'; 'I can speak a fair amount of Welsh'; 'I can speak a little Welsh'; and 'I can just say a few words'.

were set to reflect the demographic profile of Welsh speakers by age within gender within region and no more than one person was interviewed in each household.

At the analysis stage data was weighted by age within gender within region to fine tune any minor imbalances in the interviewed sample (again based on 2012-2013 National Survey for Wales data).

The sample for the survey was sourced from UK Changes, a specialist survey sample provider. A selection of telephone numbers generated by Random Digit Dialling (RDD) was obtained, with numbers screened to ensure the exclusion of those likely to be non-residential. The Beaufort CATI (Computer Aided Telephone Interviewing) system randomly presents numbers for interviewers to call. On making contact with a household, an introductory question ('Do you speak Welsh?') was asked to determine if a potential participant was a Welsh speaker, then a series of screening questions were asked to determine fit with quota controls.

Interviews were conducted over the phone from Beaufort's dedicated CATI centre in Cardiff. A bilingual questionnaire was used and all interviewers working on the survey were fluent in Welsh, therefore all participants were able to take part in their preferred language.

Interviewing for this survey took place between 13 January 2013 and 4 February 2014 and was based on a structured questionnaire.

Consumer Futures Research

The main source of information was the responses received to a questionnaire sent to 38 service providers of various types, including a sample of providers of postal, energy, telecommunications, rail, bus and water services. (It was also sent to a sample of health, education and local government bodies and providers of emergency services.) A geographical spread was aimed for within the sample, in terms of the location of the service providers, which were otherwise randomly selected.

16 responses were received, with some service providers opting to provide their responses orally in a prearranged meeting, whilst others chose to respond in writing. Clearly this number of responses, even when taken together with the information published on the internet, offers only a brief snapshot of the views and experiences of service providers in Wales, and the analysis should be considered indicative but not reflective of the views of all service providers in Wales.

Any quotes noted in the report are not attributed to any service providers or individuals. This was agreed in advance with respondents to encourage openness in their responses.

In order to gauge the extent to which services in Wales are provided in a default language, Consumer Futures also conducted an audit of the telephone and online services provided by 42 service providers. This limited sample size was only intended to provide a possible indication of how services are being delivered generally. All of the 42 service providers included in the exercise are included within the scope of the Welsh Language Measure (Wales) 2011, consisting of private companies providing postal, energy, telecommunications, rail, bus and water services, as well as a range of public bodies working in the health, local government, education, central government and policing sectors. Providers of a range of different types of services were deliberately included in the review, chosen on the basis of a geographical spread. Other than that providers were randomly selected. Of the 42 service providers included in the exercise, 27 were implementing statutory Welsh language schemes however it was not known whether the service providers had committed to provide the specific services in question in Welsh, in order to retain the randomness of the sample.

A very simple methodology was used to conduct the review. On 17 September 2013, a member of Consumer Futures staff telephoned the selected services and visited websites from his workstation.

The main websites of all 42 service providers were visited once and categorised as follows, on the basis of the availability of Welsh language content:

- Explicit choice given to view content in Welsh or English
- English content provided as a default with a clear choice given to view content in Welsh
- English content provided as a default with Welsh content available but not easy to find
- No option given to view content in Welsh
-

As reflected in these categories, the purpose of the exercise was to identify the prominence of Welsh language content on websites, not the amount of content available in Welsh. As very few services are thought to be provided in Welsh as a default, it was not deemed necessary to include this as a category.

The first criteria used to categorise websites was whether or not the user was provided a clear choice of viewing content in Welsh or English when first visiting the site, for example through the use of a splash page⁴⁷. All websites offering a language selection facility, without offering content in any default language, were placed in the first category above. Where content was provided in English as a default, the prominence of the option to view content in Welsh i.e. the size of the text and its location on the homepage, determined whether websites were placed in the second or third categories. The fourth category is self-explanatory. Using this simple methodology, the vast majority of the 42 websites were easily categorised.

On the same day a review was conducted of the telephone services provided by the same set of service providers. Some of the service providers included within the exercise offered a variety of telephone helplines. The review focused on the helpline that members of the public would likely use most frequently to communicate with the provider e.g. the 'general enquiries' helpline, the 'bill enquiries' helpline in the case of utility providers etc. The total number of telephone helplines reviewed was two less than the number of websites reviewed as two of the service providers in question provided a website but no telephone services in any language. All helplines reviewed were called twice.

Telephone services were categorised as follows:

- Explicit choice of a service in Welsh or English
- Service provided in English as a default with a clear choice of a Welsh language services available
- Service provided in English as a default with a Welsh language service available but not easy to find
- No Welsh language service available.

⁴⁷ A 'splash page', for the purpose of this exercise, was the first page to appear having searched for and clicked on the organisation's website using a Google search, which commonly provides the user with an option of choosing to view the site in either language.

Service providers which offered a clear choice of a service in English or Welsh from the outset, for example a bilingual recorded message enabling the user to choose to continue in Welsh or English, were placed in the first category above. Service providers which offered a specific telephone number for a Welsh language helpline were also placed in the first category, where the telephone number was easy to find on the organisation's website. Where a specific Welsh language helpline was on offer, and clearly publicised on the organisation's website, the availability of the service in Welsh was confirmed through telephone calls.

Where telephone services were provided in English as a default but where a clear choice of a service in Welsh was available, for example where an agent answering the call offered to transfer the call to a Welsh speaking colleague, the service was placed in the second category above.

The third category was reserved for those service providers which did offer a telephone service in Welsh but which did not publicise that clearly on their websites and which gave no indication that it was available when contacted by phone.

The information available on service providers' websites about their Welsh language telephone services was prominent in deciding how to categorise services, as it was felt that service users rely heavily on websites to find telephone numbers. Categorising telephone services using such criteria was less clear-cut than categorising websites. Subjective decisions had to be made, especially in choosing whether to place an organisation's telephone service in the second or third categories. Accordingly the data should only be considered a broad indicator of the availability and accessibility of the telephone services in Welsh.

Our aims

- To provide the advice people need for the problems they face.
- To improve the policies and practices that affect people's lives.

Our principles

The Citizens Advice service provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We value diversity, promote equality and challenge discrimination.



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Citizens Advice is an operating name of the
National Association of Citizens Advice Bureaux.

Registered charity number: 279057

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Produced by: Citizens Advice Cymru

Published: March 2015

