

English by default

Understanding the use and non-use
of Welsh language services

Summary report



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.

Summary

This report summarises the findings of research into 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 providers². Citizens Advice Cymru has since taken on responsibility for this work as part of our role to represent consumers in Wales³.

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

2 The consumer element of the research was undertaken by Beaufort research in two phases. The first phase involved six deliberative focus groups across Wales with fluent Welsh speakers. This included a pre-task and activities during the discussions. This was followed by a large scale qualitative survey of a representative sample of 505 fluent Welsh speakers. Fieldwork took place between November 2013 and February 2014.

In addition, Consumer Focus Wales sent questionnaires to 38 service providers (postal, energy, telecommunications, rail, bus and water service providers together with a small sample of public sector organisations). 16 responses were received; therefore this survey only offers a snapshot of views rather than a reflection of service providers in Wales generally. A review of the Welsh language telephone services and websites offered by 42 service providers was also undertaken. All of the 42 providers are within the scope of the Welsh Language Measure (Wales) 2011.

3 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

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. 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 increasing⁴. 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.

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

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

4 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.

- 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 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 providers⁵, not having the option or choice to use Welsh was the main spontaneous reason

⁵ Banks and building societies and also gas, electricity, phone, television and broadband suppliers

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.

*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)*

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.

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 Welsh⁶, 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

6 See footnote 3

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 inadequate⁷ 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 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

⁷ As highlighted by our review of Welsh language services

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 economics⁸ 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.

"...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?"⁹

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.

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.

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)

It was fine actually, so maybe it's habit more than anything, because I do it [in English], and it was easy to understand. . . . It was just as easy to find the Welsh form. . . . Yeah it was clear,

⁸ 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.

⁹ NUDGE! NORMALIZING THE USE OF MINORITY LANGUAGE ICT INTERFACES (Keegan and Evas 2011) – p51

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)

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

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)

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

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)

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

*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)*

*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)*

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.

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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