

***LIVING LIVES THROUGH THE MEDIUM
OF WELSH STUDY***

SUMMARY REPORT

October – December 2005

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1. EXECUTIVE SUMMARY

A joint research project was commissioned in 2005 by S4C, the Welsh Language Board, BBC Wales and the Arts Council of Wales, to examine the extent to which Welsh speakers (and, in particular, the 22-45 year age group) live their lives through the medium of Welsh.

The study comprised an initial quantitative phase amongst a robust sample of 861 Welsh speakers across Wales, profiling their current levels of participation in a range of Welsh (and the equivalent English) medium activities as well as their attitudes towards the Welsh Language. This was followed by a cluster analysis exercise on the data collected from the survey and a series of in-depth qualitative interviews with 39 Welsh speakers aged 22-45. Fieldwork took place in early October to early December 2005.

The key findings are:

- Fewer 22–45 year old Welsh speakers describe themselves as fluent in Welsh than people in other age groups.
- 22-45 year old Welsh speakers live their lives to a lesser extent through the medium of Welsh than older Welsh speakers, but there appear to be other factors influencing this, alongside any possible underlying apathy or lack of engagement with the Welsh Language, as people in this age group say they are more interested in improving their Welsh than is the case overall.
- The cluster analysis exercise identified six cluster groups, each with their own distinct characteristics and different levels of usage of Welsh in their everyday lives: Embracers (9% of all 22-45s), Mainstreamers (21%), Enrichers (8%), Desirers (24%), Apathetics (12%) and Strivers (26%). Four in ten of those aged 22-45 fall into the two clusters with the lowest degree of fluency in Welsh (Strivers and Apathetics).
- Welsh speakers aged 22-45 perceive the Welsh Language to have a more positive image and to be in a stronger position now than ever before, so the context appears to be conducive to a greater use of Welsh in everyday lives.
- The factors that influence the extent to which Welsh speakers in this age group live their lives through the medium of Welsh are complex and inter-related. Their significance often differs between clusters, although some are important to all segments. They can be summarised as:
 - How fluent is their Welsh?
 - To what extent do they have the opportunity to use the Welsh Language?
 - Is there a Welsh Language option available?
 - How salient or top of mind is the Welsh Language option?
 - How easy is it to access or to find out what's available in Welsh?
 - Does what's on offer in the Welsh Language satisfy their requirements or desires?
 - How apprehensive are they in using Welsh in a certain situation?

Our recommendations to increase participation are centred round 5 main themes that emerged from the study findings, namely:

1. Marketing

Consider cross-media promotions and marketing and the use of mainstream channels and English Language media to publicise and increase the visibility and profile of Welsh Language media and the arts

2. Choice and Relevance

Broaden the portfolio of events / products / programmes on offer (in whatever ways possible), to introduce more that are specifically tailored to the 22-45 year age range and also that cater for more populist tastes and some C2DEs

3. Distribution

Increase distribution for Welsh Language products in mainstream, high street retailers, to make the Welsh Language options more readily available, and visible, to all Welsh speakers

4. Education and Information

Consider information and education and training campaigns to overcome the barriers of habit / inertia and also to minimise the perceptions of risk associated with using Welsh in certain formal situations

5. Opportunity

Facilitate opportunities for Welsh speakers to use Welsh whenever possible in their everyday lives, whether through helping build learners' confidence by creating informal, relaxed situations in which to practise their Welsh or by making it easier to identify other Welsh speakers in public places.

2. INTRODUCTION

2.1.1 Background and Aims

In summer 2005, S4C, the Welsh Language Board, BBC Wales and the Arts Council of Wales decided to co-operate on a joint research project, awarded to Beaufort Research. The study's aims were to examine the extent to which Welsh speakers live their lives through the medium of Welsh, with particular focus on the 22 – 45 year age group.

Specific objectives were as follows:

- To gain insight into how Welsh speakers make their decisions about what elements of their lives they live through the medium of Welsh
- To investigate the current image of the Welsh Language in Wales and what effect this has on the decision-making process
- To discover what the barriers are to participating in Welsh Language events and partaking of Welsh Language media, press and publications, and what the incentives are for those who do so
- To discover ways of increasing participation in the above

2.1.2 Methodology

The methodology adopted comprised two distinct phases of research and a combination of quantitative and qualitative methods:

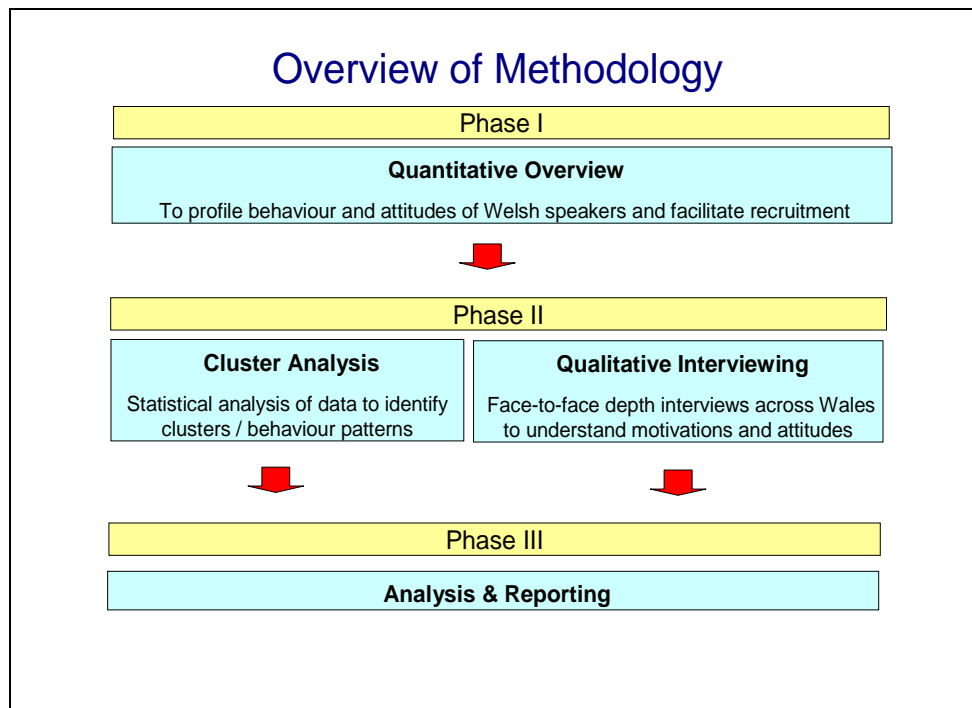


Figure 1

Taking each element in turn:

- **Quantitative Overview**

As a starting point, a snapshot of the behaviour and attitudes of a representative sample of Welsh speakers across Wales aged 16 and over was obtained, using the Beaufort Omnibus Survey of Welsh Speakers.

For the purposes of this study, the total sample of 1,012 adults who said they could speak some Welsh was narrowed down to 861. Those who could only say a few words of Welsh were excluded.

Eligible Welsh speakers were then asked a series of questions regarding their participation in different Welsh Language and English Language activities, covering media and the arts, as well as questions concerning their usage of the Welsh Language in different situations inside and outside the home, and their attitudes towards the Welsh Language.

Interviewing was carried out from 6th to 12th October 2005.

- **Cluster Analysis**

Following on from phase I, a cluster analysis exercise was carried out using the data collected in the Welsh Speakers Omnibus Survey. This took into account attitudinal, behavioural and demographic data.

The initial analysis was conducted on the whole data set (that is, adults aged 16+), but the cluster segmentation that emerged was then checked to ensure that the solutions were relevant to the 22-45 year age range, who were the emphasis of the project.

- **Qualitative Interviewing**

The last element of the study focused solely on those in the 22-45 year age group. 21 free-flowing depth interviews (mostly paired, some with individuals) were carried out with 39 Welsh speakers across Wales, clustered into 6 locations:

South East Wales	Cardiff
West Wales	Llanelli
Mid Wales	Aberystwyth
North East Wales	Wrexham
North West Wales	Llangefni and Llandudno

Interviewing took place from 28th November to 7th December 2005.

3. RESEARCH FINDINGS

3.1 THE CONTEXT

3.1.1 How much do Welsh speakers currently live their lives through the medium of Welsh?

At the beginning of the survey, Welsh speakers were asked to define their fluency in Welsh. Overall, 60% described themselves as 'fluent' but the proportion saying this was lowest amongst the 22-45 age group (at 53%) and highest amongst those aged 46 and over (66%).

<i>Which best describes your ability to speak Welsh?</i>				
%	All Welsh Speakers (861)	Aged 16-21 (126)	Aged 22-45 (270)	Aged 46 + (465)
I'm fluent in Welsh	60	56	53	66
I can speak a fair amount of Welsh	17	19	20	15
I can only speak a little Welsh	22	25	27	18

Table 1

The quantitative survey shows that usage of Welsh Language media sources and attendance at Welsh Language arts and cultural events by Welsh speakers across all levels of fluency is nearly always lower than is the case with the English Language equivalents.

What's more, participation in Welsh Language activities is lower still on the whole amongst those in the 22-45 year old age range, who are the focus of this study.

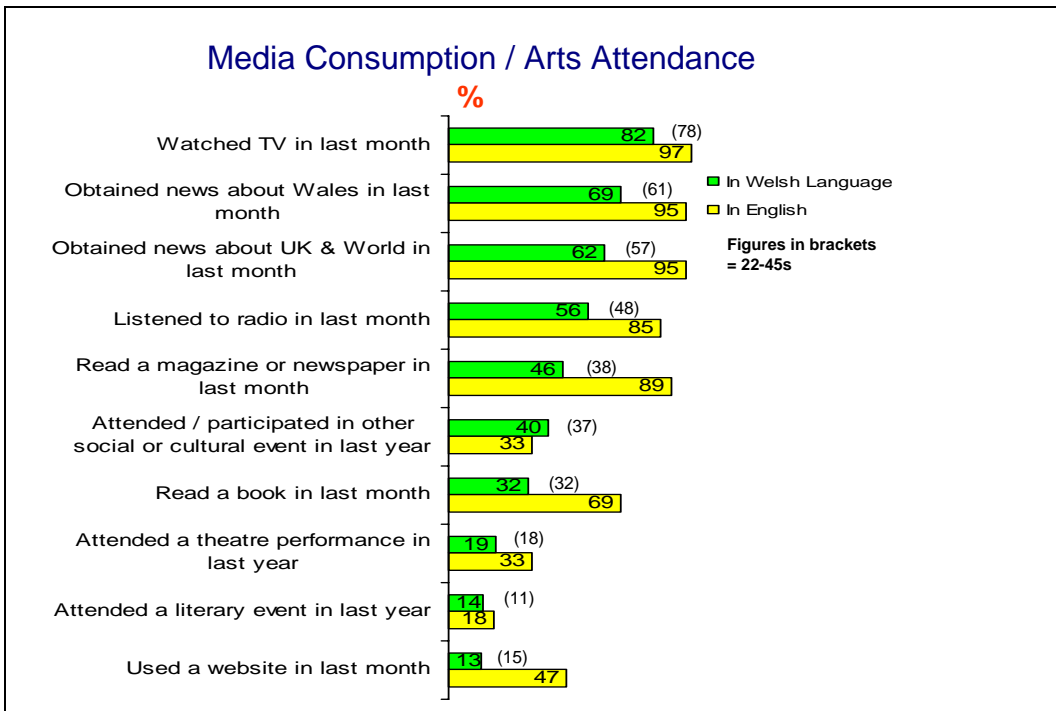


Figure 2

Not surprisingly, there is a clear relationship between level of fluency and participation – those who describe themselves as fluent in Welsh are most likely to participate in every Welsh medium activity.

However, even fluent Welsh speakers are nearly always more likely to be doing these things through the medium of English than Welsh. For example, 96% of fluent Welsh speakers said they've watched English Language TV in the last month (compared with 91% saying they've watched Welsh Language TV in that time period), 82% that they've listened to English Language radio (compared with 71% saying that about Welsh Language radio) and 64% said they've read an English Language book (compared with 38% having read a Welsh Language book) (see Figure 3).

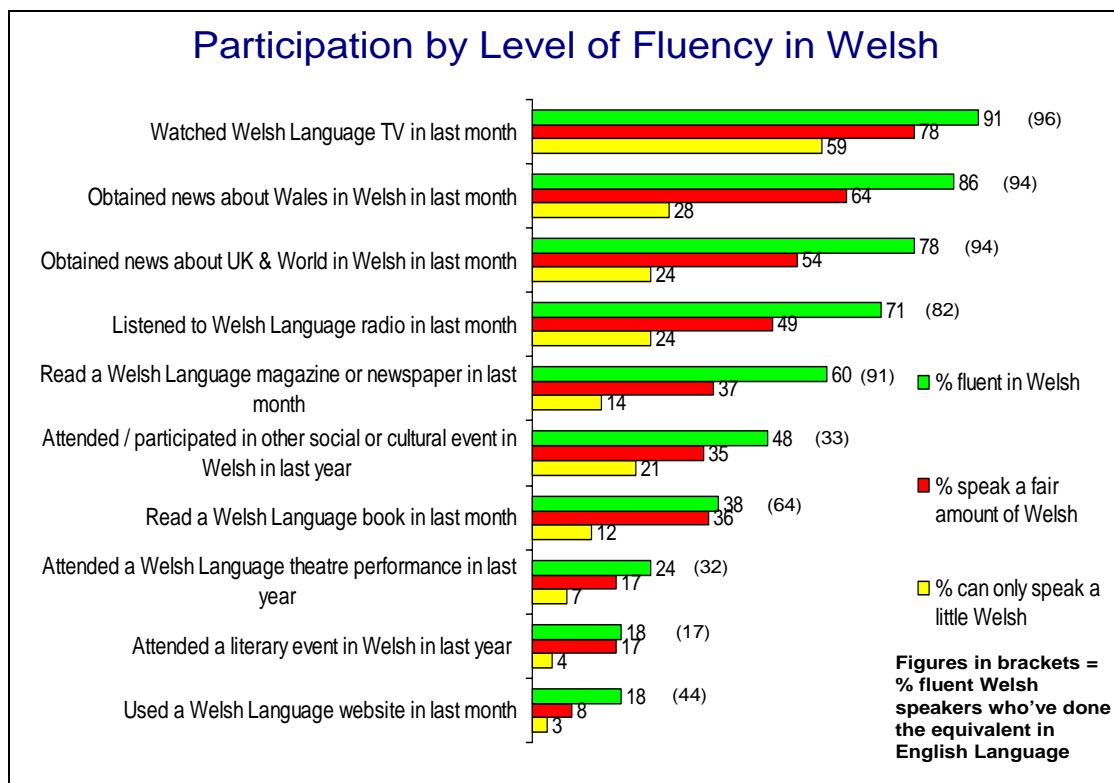


Figure 3

The 22-45 year age group is less likely than older Welsh speakers to always or usually speak Welsh at home and outside the home, and less likely to agree that ‘they feel more comfortable speaking Welsh than English’. At the same time, they are more interested than is the case overall in improving their Welsh and in having the opportunity to use the Welsh Language more.

So, whilst 22-45 year olds live their lives to a lesser extent through the medium of Welsh than older Welsh speakers, it does not appear to be completely driven by apathy or an underlying lack of interest. Other factors must therefore be contributing and these are explored in more depth below.

3.1.2 Can we segment Welsh speakers in a way that will help us understand their behaviour and that offers an opportunity to increase participation in future?

The cluster analysis identified 6 cluster groups, each with their own distinct characteristics and differing levels of living their lives through the medium of Welsh:

1. Embracers
2. Mainstreamers
3. Enrichers
4. Desirers
5. Apathetics
6. Strivers.

The table below summarises the key differences in the profile of each cluster:

Dimension	Cluster Group					
	Embracers	Mainstreamers	Enrichers	Desirers	Apathetics	Strivers
% of all Welsh speakers in cluster	12	28	8	23	11	18
Fluent in Welsh	Very high	Very high	Middling	Middling	Low	Very low
Started speaking Welsh as small child	Very high	Very high	Middling	Middling	Fairly low	Low
Can read and write Welsh very well	Very high	Fairly high	Middling	Middling	Low	Very low
Everyone in household speaks Welsh	High	High	Middling	Middling	Low	Low
Proportion aged 22-45	Low	Low	Middling	Middling	Middling	High
Proportion of ABC1s	High	Low	Very high	Middling	Middling	Middling
Use of spoken Welsh	High	High	Low	Low	Fairly low	Low
Participation in Welsh Language Arts & Culture	High	Low	High	Fairly low	Fairly low	Fairly low
Consumption of Welsh Language Media	High	High	Fairly high	High	Low	Low
How positive towards Welsh Language	Fairly high	Middling	Fairly low	Middling	Low	Fairly high
Definitions:						
Use of spoken Welsh: always / usually speak Welsh at home / outside home / outside circle of family & friends: agree strongly 'I'm more comfortable speaking Welsh than English'; always complete the Welsh version of official forms						
Participation in Welsh Language Arts & Literature: attended in last year Welsh Language theatre / literary event / other social or cultural event; read or used in last month Welsh Language book / magazine or newspaper / website						
Consumption of Welsh Language Media: watched or listened to in last month Welsh Language TV / radio; obtained news in Welsh in last month about Wales / about UK & World						
How Positive towards Welsh Language: agree 'I wish I could speak Welsh better' / 'Welsh speakers should try to use Welsh more often' / agree strongly 'I'd welcome the opportunity to do more in Welsh' / 'Being able to speak Welsh helps you fit in better in Wales'						

Table 1

While Mainstreamers account for the biggest proportion of adult Welsh speakers overall (28%), Strivers (at 26%) and Desirers (24%) represent the highest proportion of 22-45s – both clusters which tend to have lower fluency levels.

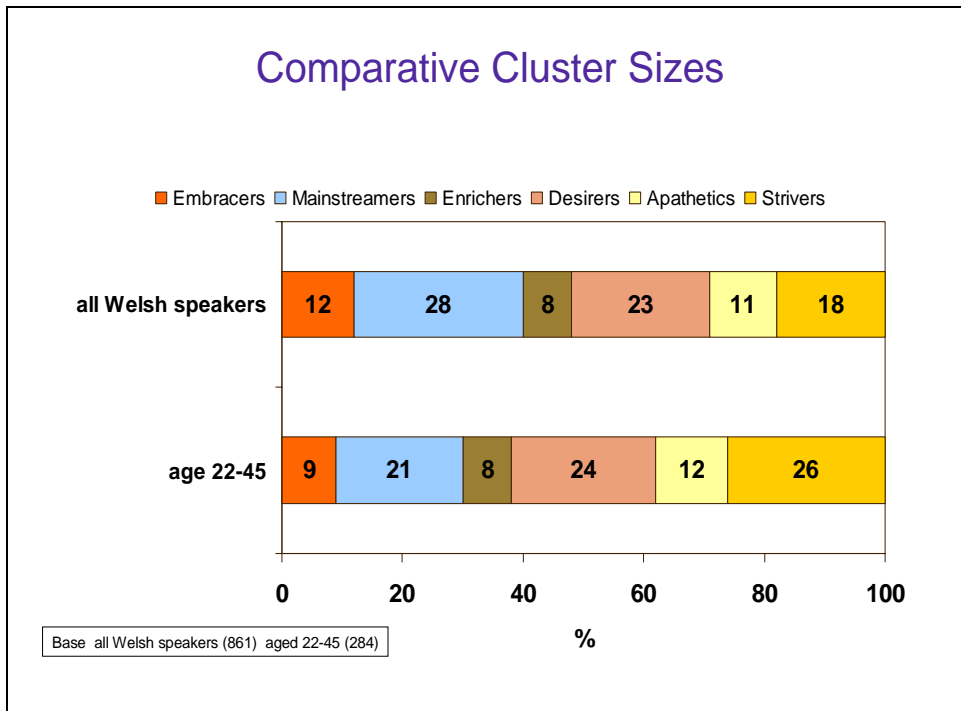


Figure 4

3.2 THE QUALITATIVE FINDINGS

The cluster groupings have been used as the basis for the analysis of the qualitative findings. However, it is important to note that, as the depth respondents were not recruited on the basis of cluster membership, there are two cluster segments not represented in the sample: Enrichers and Apathetics.

3.2.1 What is the current image of the Welsh Language?

The general consensus amongst Welsh speakers aged 22-45 was that the Welsh Language has a more positive image and is in a stronger position now than ever before. Had the depth sample included Apathetics, however, there may have been dissenting views. Apathetics are far less positive in terms of their attitudes towards the Welsh Language than all other clusters. For example, only 28% of Apathetics agreed that 'Being able to speak Welsh helps you fit in better in Wales' (compared to 74% overall) and 43% were of the opinion that 'Welsh Language culture can seem a bit irrelevant at times' (compared to 25% overall).

Those interviewed highlighted the fact it's perceived to be 'cool' to be Welsh nowadays, which has influenced perceptions of the language and made it fashionable to speak Welsh. The general view (especially from those living outside the 'heartland' Welsh speaking areas) was that the language has

greater visibility now and broader acceptance, with much more Welsh spoken in places like Cardiff and with a steady growth in Welsh medium education.

Speaking Welsh was felt by those in all clusters to be advantageous in career terms, helping one get on in work. It was also felt by Desirers and Strivers to open up new social circles and, by a few in SE Wales, to enhance their status (as it's something not everyone in this area can do). The only disadvantage, cited by a minority of Strivers, was that it could be perceived as exclusive and rather unwelcoming by non-Welsh speakers.

So the general context seems conducive to greater, rather than lesser, use of Welsh in everyday life.

3.2.2 How do Welsh speakers make decisions about what aspects of their lives they live through the medium of Welsh?

It is not always a conscious decision whether or not to use Welsh or to partake in Welsh medium activities – often, it is instinctive or is driven by habit.

Most Embracers and Mainstreamers tend to speak and use Welsh without thinking, because it comes naturally to them. At the same time, many are conscious that being able to speak Welsh is something special, which brings emotional rewards and a sense of belonging or connection to an area or to those around them. Desirers and Strivers are more likely to make conscious decisions on whether they will use Welsh in a certain situation, because their use of Welsh is not instinctive. Their rewards from doing so are often a sense of achievement.

3.2.3 What are the influences on and barriers to living lives through the medium of Welsh?

The factors that influence the extent to which Welsh speakers live their lives through the medium of Welsh are multiple, complex and interrelated. They are summarised below, along with the barriers that are working against greater use of the Welsh Language in everyday lives:

- **How fluent is their Welsh?**

Not surprisingly, **actual or perceived fluency in Welsh**, together with the associated issue of confidence in one's abilities, has a huge influence on the amount that is done through the medium of Welsh.

Lack of confidence was a major barrier to using the language and to partaking in certain Welsh Language activities for Desirers and Strivers. These groups were often reluctant to speak Welsh to others (especially outside their 'comfort zone' of close family and friends), let alone write in Welsh. Some commented that they often encountered **problems when**

trying to practise their Welsh, in that the Welsh speaker would switch to English on realising they weren't fluent, rather than letting them persevere.

They also had **practical difficulties with certain Welsh Language media**, such as radio (saying presenters speaking too quickly made it difficult to follow what was going on), books and magazines (where some were critical of the formal nature of the Welsh used) and websites (where the lack of computer literacy of some made attempting to use a Welsh Language site doubly problematic).

What's more, many of the more fluent segments (Mainstreamers in particular) were **hesitant to write in Welsh or to use Welsh in a formal context**, with insecurities voiced about their grammar, vocabulary and understanding of technical or specialist terms. So, even those who describe themselves as fluent would often not consider filling in Welsh versions of official forms.

- **Do they have the opportunity to use the Welsh Language?**
Personal circumstances (that is, the language spoken by household members, by their circle of family and friends, as well as where they live or work) have a major effect on whether, when and how often Welsh speakers in this age group use the Welsh Language.

The main barrier to speaking Welsh for Embracers and Mainstreamers was simply **coming into contact with people who can't speak the language**. This lack of opportunity to use Welsh was more of an issue for Desirers and Strivers, who were more likely to live and work in areas where Welsh does not have much of a presence, to have no established Welsh-speaking social networks and also to live in households that included non-Welsh speakers. In the latter situation, English tends to dominate, even where their partner is a fluent Welsh speaker, unless a more 'formal' arrangement is made, e.g. to only speak Welsh to each other on certain days.

- **Is there a Welsh Language option available?**
There seem to be certain areas of the media where **no direct Welsh Language equivalent exists**, particularly in the arena of mainstream, popular culture. Some Mainstreamers commented there are no Welsh Language 'real life stories' or celebrity women's magazines such as 'Take a Break' on sale, for instance. There was also a perception that there were no Welsh Language magazines for their children.

As a result some people, especially Mainstreamers but also Desirers and Strivers coming from the perspective of wishing to learn or improve their Welsh, **felt that what was available in Welsh tended to be quite serious and highbrow**. The view expressed that the Welsh used in the arts and media (including both TV and radio) was very formal and 'proper' and sometimes difficult to understand, no doubt contributes to this perception.

- **How salient or top of mind is the Welsh option?**
Lack of awareness that one can do certain things in Welsh sometimes underlies why people don't use the Welsh Language more in their everyday life. For example, most Welsh speakers in the study (even regular web users) did not know that any Welsh Language websites existed and sometimes had no idea how to go about finding them. At the same time, there was a lot of interest in the idea and many said they now intended to search them out.

Habit (and inertia) also link in to this point - sometimes, Welsh speakers acknowledge that they don't do certain things in Welsh just because they're used to doing them in English and have never really thought about doing things differently, for example, using the Welsh Language option when withdrawing cash from a Bank ATM. There are also other factors that come into play with this, however, such as **perceptions of the risk involved, one's state of mind** (if people are in a hurry they're more likely to take the 'tried and tested' route which they assume will be quicker) and also the **formality of the situation and therefore the type of Welsh involved**.

- **How easy is it to access Welsh Language products or to find out what's on in the Welsh Language?**
 The study indicates that many Welsh speakers have **difficulties in knowing where to go for Welsh Language books, magazines and music**, especially Desirers and Strivers living outside Welsh heartland areas. Some non-fluent Welsh speakers would have no idea even where to find Radio Cymru on their radio.

Even where people are aware of where Welsh Language material is available or on sale, many are **critical of having to go out of their way, to places such as specialist Welsh Language shops, to access it**. Many Welsh speakers, for example, could not understand why a reasonable selection of Welsh Language books were not on sale in mainstream bookshops such as Waterstones, so they could buy Welsh books at the same time as English ones (at the moment, they felt the choice of Welsh Language titles available in high street bookshops was very poor). The same point was made in relation to films by a few people, who asked why aren't Welsh Language films available to rent in high street video shops?

More generally, **sources of information for Welsh speakers on what's going on through the medium of Welsh tended to be very ad hoc**, with heavy reliance on posters in specialist 'Welsh Language' places such as bookshops, cafes and pubs, and also on word of mouth. People who didn't go to these places or didn't have established Welsh-speaking social networks (mainly Desirers and Strivers) therefore felt they **had very little idea of what was happening locally in the Welsh Language**. Even those who did (mainly Embracers and Mainstreamers) tended to be **critical of the amount of information and publicity for Welsh**

Language events, commenting that the **onus was on the individual to search it out** and that many people therefore missed out.

- **Does what's on offer in the Welsh Language satisfy Welsh speakers' requirements or desires?**

Quite obviously, **Welsh speakers will not take part in Welsh Language activities or consume Welsh Language media simply because these take place or are broadcast or published in the Welsh Language** – they must have an interest in the category per se. Hence, most Welsh speakers 'cherry pick' Welsh Language TV programmes (just as they do when watching English Language TV), tuning in to S4C when there is something on of interest to them personally, rather than watching the channel all the time.

That an interest in the category or genre is a prerequisite to participating in it through the medium of Welsh is borne out by the example of Welsh Language theatre - Welsh speakers' likelihood of attending Welsh Language theatre is much higher if they also attend English Language theatre productions.

Even where people are sufficiently interested to attend / watch / listen / read in Welsh, they will only do so regularly if the product on offer satisfies their requirements. The research indicates that there are **perceived to be gaps in what's on offer in the Welsh Language media** - many of the under 40s in particular (across all four cluster segments) felt that much of S4C's output was just not relevant or interesting to their age group. S4C was thought by these Welsh speakers to be weak on dramas, comedies, soaps and lifestyle programmes aimed at those in their teens to late 30s, but much better at serving the needs of younger viewers and the over 50s. Radio Cymru was also criticised for being dry, boring and 'for older people' by many of the under 40s, although few of these had listened lately.

Although Welsh Language media on the whole was not perceived as being inferior to English Language media it was acknowledged that it had a difficult job to do, having to be 'all things to all men'. This highlights another major and interlinked issue that emerged, namely **dissatisfaction with the lack of choice available in terms of Welsh Language TV, radio and books and magazines**. Many people called for more choice in all these media. In most cases they meant broadening the portfolio of programmes on S4C and Radio Cymru or increasing the range of books on offer in the Welsh Language, to include some that would have more appeal for them, but also, in a few cases, there were calls for more TV channels and radio stations offering Welsh Language programmes.

- **How nervous are they in using Welsh?**

Lastly, there are **certain situations where there is a higher perceived degree of risk associated with using Welsh than English**. Even fluent Welsh speakers (mostly Mainstreamers but sometimes Embracers) had misgivings about using the Welsh option at cashpoints and about dealing with 'officialdom' in Welsh. Not one Desirer or Striver in the depth

interviews would feel confident in taking out cash in Welsh. People were not confident that they would fully understand the terminology used and, because the consequences of misunderstandings could be serious, played safe and used English.

3.2.4 Summary of the barriers to living lives more fully through the medium of Welsh

The main barriers that work against Welsh speakers aged 22-45 in the four clusters covered in the qualitative study making more use of Welsh in their everyday lives are summarised below. Figure 5 also identifies their importance to each cluster segment:

Overview of Barriers				
BARRIER	Embracers	Mainstreamers	Desirers	Strivers
Confidence	Low (but higher for writing in Welsh)	Relatively low (but higher for writing in Welsh)	High	Very high
Opportunity to use Welsh	Low (but can vary, depending on home location)	Relatively low	High	Very high
Perception it's more risky in Welsh	Low	Middling (for certain things)	High	High
Lack of saliency / awareness of Welsh option	Middling	Middling	High	High
Habit / inertia	Low to middling	Middling	Low	Low
Accessibility of Welsh Language options	Low (but depends where you live)	Relatively low	High	High
Language / formality of Welsh makes it difficult to understand	Low	Relatively low	High	High
Attitude / behaviour of other Welsh speakers	Non-existent / Low	Non-existent / Low	High	High
Limited choice in Welsh Language	Universally high			
Lack of relevance / appeal of Welsh Language options to this age range	Generally high (exception = some 40+)			

Figure 5

As there were no Apathetics within the sample for the qualitative study, attitudinal barriers related to lack of interest or willingness to use the Welsh Language did not emerge as significant. Had this cluster group (defined by their lack of engagement with the Language, as evidenced earlier) been included, the findings may well have been different.

4. RECOMMENDATIONS

4.1 How can participation be increased?

As the report demonstrates, the motivations for and barriers to living lives through the medium of Welsh are as diverse as Welsh speakers themselves. Not surprisingly, there is no one 'quick fix' solution that can be advocated, therefore. However, there are some clear themes emerging from the study that, taken in combination and over time, should have the effect of increasing participation. These are summarised in the table below:

Theme	Objective	Suggested Actions
1. Marketing	To increase the visibility and profile of Welsh Language media and arts To counter any negative perceptions regarding specific media that may be out-dated but still persist (e.g. Radio Cymru) To make Welsh speakers who don't necessarily participate much through the medium of Welsh at the moment aware of the range of Welsh medium activities that are on offer	Cross media promotions / marketing - use mainstream channels and English Language media or equivalents to raise awareness of the Welsh Language options (e.g. the recent Radio Cymru promotional campaign on BBC1 Wales; advertising Welsh Language theatre or arts events at English theatre productions and in the 'what's on' pages of the local English Language press; promoting Welsh Language music gigs in mainstream record stores and at English Language gigs)
2. Choice and relevance	To offer Welsh speakers products / programmes that are more appealing to them and that they are more likely to buy / watch as a result To plug any gaps where no Welsh Language equivalent exists To address any barriers regarding the type of Welsh used	Broaden the portfolio of events / products / programmes on offer, to introduce more that are specifically tailored to the 22-45 year age range and the more populist tastes of some C2DEs Consider utilising new technology or adapting existing data streams to make room for more targeted, contemporary output Review the level of formality of the Welsh Language used in the media, especially the news Introduce content / programmes geared towards improvers and learners, using more relaxed, conversational Welsh
3. Distribution	To make Welsh Language books, magazines and music more readily available and position them more in the mainstream	Increase distribution for Welsh books and CDs in mainstream, high street bookshops and record stores – an enhanced presence should not only lead to increased sales but should also help to raise the profile of Welsh Language products Also, introduce more proactive marketing of alternative channels for buying Welsh Language books and music, such as online
4. Education	To overcome any misgivings people	Consider a communications campaign with

<p>and information</p>	<p>may have in using the Welsh Language in certain formal situations To overcome the ingrained inertia / habit that makes people continue as before</p>	<p>the message that it's very easy and low risk to use the Welsh Language option at cashpoints Help fluent Welsh speakers overcome any confidence issues with their written Welsh, through 'refresher' courses Have Welsh and English versions of official forms side-by-side, rather than top and tail Encourage Welsh speakers to exert positive peer pressure on others to do it in Welsh, not English Encourage fluent Welsh speakers to be more tolerant and supportive of learners, by speaking more slowly and not switching to English Encourage Welsh speakers in mixed language households to use Welsh not English with family members who are learning the language</p>
<p>5. Opportunity</p>	<p>To facilitate the use of Welsh wherever possible</p>	<p>Create / open up Welsh Language social networks for those without any naturally (e.g. Strivers who are learning the language) Foster informal, non-intimidating situations for Desirers and Strivers who are learning, to practise their Welsh Make it easier to identify other Welsh speakers in public places / on the high street to encourage the use of Welsh Encourage those educated through the medium of Welsh to form lasting Welsh speaking social networks which will ensure they do not lose their Welsh on leaving school or university</p>