

# Using the Welsh language – the business case

A report on consumer demand and the  
opinions of business leaders



Comisiynydd y  
Gymraeg  
Welsh Language  
Commissioner





## Foreword

**This report is for business leaders looking to develop or expand in Wales. It looks at the consumer demand for Welsh language services, the opinions of business leaders and how the Commissioner can help you grow and prosper.**

At the Welsh Language Commissioner's office we are acutely aware that our daily lives are full of interactions with businesses across Wales. This is why we put a lot of energy into working with the business sector; we see them as vital players if we're to truly succeed in our vision of a bilingual Wales for all.

We have a specialist team called 'Hybu' which means 'to promote', working with businesses across Wales to seize opportunities and work proactively to develop the use of Welsh across the board.

## Consumer demand



According to the last Census we have 562,000 (19%) Welsh speakers in Wales and by far the biggest group are amongst 5 to 15 yrs old where 40.3% say that they can speak Welsh. Many more have some ability in the language. With so many young people learning the language this gives you a major opportunity for business growth.

Over the years we've been listening closely to what the public are saying. The evidence gathered by us and others consistently points towards the overwhelming support for the Welsh language. This is amongst Welsh speakers and non-Welsh speakers alike.

In the first part of this report we'll present an overview of the demand for Welsh language services amongst consumers across Wales.

### National Survey for Wales

The National Survey for Wales annually gathers opinion from over 11,000 participants. A recent survey concluded that 86% of the population felt that the Welsh

language was something to be proud of and that 62% would like to be able to speak Welsh.<sup>1</sup>

### Citizens Advice Bureau Research<sup>2</sup>

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

### Welsh Language Commissioner Research<sup>3</sup>

- 83% agree that supermarkets that use the Welsh language are showing respect towards Welsh culture
- 74% agreed that using the Welsh language shows that the supermarket is supporting the local community

- 28% of 16 – 34 year olds agreed that they would be more likely to shop at a supermarket that uses Welsh

- 78% agreed that using some Welsh on product packaging helps supermarkets demonstrate support for local producers

### Welsh Food and Drink<sup>4</sup>

- 8 out of 10 shoppers (78%) would always buy Welsh if the price was right and 44% would pay more for Welsh produce
- 62% of Welsh consumers believe it is important to have Welsh produce on the menu in restaurants

<sup>1</sup> Welsh Government: Statistics and Research – National Survey for Wales (2018)

<sup>2</sup> English by default: Understanding the use and non-use of Welsh language services (2015)

<sup>3</sup> Welsh in the shopping basket: customer attitudes to the use of Welsh by supermarkets (2016)

<sup>4</sup> Value of Welshness: shopper desire for Welsh produce (Welsh Government, 2017)



## Business opinion



**In this next part we'll present the findings of our latest research into the opinions of business leaders across Wales.**

We have discussed the evidence that shows an unquestionable demand. Not only amongst Welsh speaking consumers but also amongst non Welsh speakers. Customers are looking for businesses who offer services in Welsh; they also see the language as a way of showing support for Welsh culture and identity. In times of economic uncertainty many businesses have seen this as an opportunity not to be missed.

As a team we continually look for opportunities to develop our offering. We want to know if the investment made by businesses in Welsh language services is paying off. What help do they need to maintain momentum?

These are the primary findings:

- The majority of businesses see the Welsh language as a benefit to the business
- They find that the Welsh language is a factor that enriches the brand and the value of goods and services
- Very few businesses see the Welsh language as a disadvantage



**Meinir Davies, Director at JCP Solicitors**

*"Building relationships with our clients is an all important factor in ensuring that they come back time after time. We regularly have clients who would like to discuss their legal problems with our solicitors in Welsh. Some prefer to turn to English to discuss more complicated legal matters, and others prefer an all Welsh service when possible, but that's fine, whatever suits the client."*



## The research in more detail



### The methodology

This independent research was conducted between January and March 2018. It included opinions from 82 business leaders based across Wales. The businesses ranged in size and sectors from banks to hotels, solicitors to supermarkets. The participants completed a questionnaire and took part in semi structured interviews.

The research considers the experiences and opinions of those businesses who have received support from the Commissioner's Hybu team (24%) as well as those who haven't (76%).

The researchers gathered views on a variety of topics, from current provision to marketing potential and went on to consider what support might be needed in the future.



**Andy Francis, Head of Customer Experience, Boots**

*"At Boots, we fully acknowledge the benefits of providing bilingual services to our customers in Wales. We've had a fantastic relationship with the Welsh Language Commissioner's office over the years, and are very grateful for the support we've received from the Hybu team."*

*As a large employer in Wales with 120 stores, we're always looking to develop and explore new opportunities in order to answer the needs of our customers. In terms of promoting the use of the Welsh language within our organisation, we've introduced various services including bilingual signage within our stores and having the "Cymraeg" badge on relevant staff name badges.*

*The steps that we've taken demonstrates our commitment to the Welsh language, and the invaluable support that we've received from the Welsh Commissioner's office has made a big difference to the company - giving us the confidence that we're moving in the right direction."*



## Current provision of Welsh language services by businesses

The research gathered that many businesses had good practice when it came to using Welsh language at work.



60% said that they have bilingual branding



65% said that they have bilingual signage.



63% said that they had engaged in some bilingual or Welsh language marketing.



79% of businesses said that they had staff that can speak Welsh and were able to deliver some services in Welsh.



72% said that using the Welsh language with customers and clients was a key service that works well for them.

The fact that so many businesses have a grasp of the Welsh language skills of their staff is a positive factor. This then forms a basis on which to take advantage of the free Welsh language classes that are available from the National Centre for Learning Welsh.



**Alwen Williams, Director Wales, BT Cymru**

*"BT has a significant presence in Wales and we're delighted to be the first major private sector employer to work with the National Centre for Learning Welsh on this new Welsh language programme."*

*"The programme will support employees' professional development and give them the confidence to use Welsh both in our workplaces and beyond."*

<sup>5</sup> www.learnwelsh.cymru

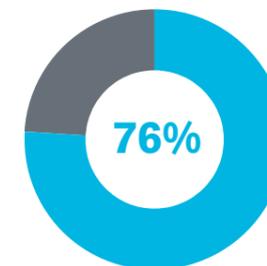


## Gaining a competitive edge?

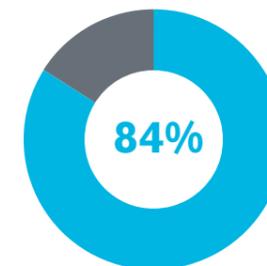
Having established an understanding of the current provision, the researchers asked more in depth questions around whether investment in Welsh language services had helped or hindered the business.

Here is an overview of the key findings:

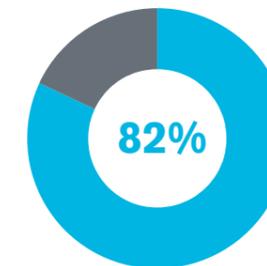
76% agree or strongly agree that using the Welsh language **attracts customers**



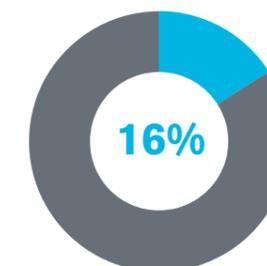
84% agree or strongly agree that using Welsh **enhances the business brand**



82% agree or strongly agree that using Welsh **adds value to a product or service**



Only 16% agreed or strongly agreed that the Welsh language **had hindered the business**



### Which factors are likely to support a business decision to invest in the Welsh language?

The motivations to invest in Welsh language services vary from business to business. Staff enthusiasm is a key factor, as well as the actions of competitors. All are keen to hear of positive case studies and success stories where businesses similar to them have seen the advantages. But by far the most significant conclusion to come from the research is that businesses base their decisions on customer feedback and this is what drives future investment.



**Gareth Davies, Lidl's Regional Director:**

*"We are incredibly proud to be part of the communities we operate in, and we are continually exploring opportunities to enhance our customers' shopping experience. We know both through feedback and the invaluable work of the Welsh Language Commissioner's Hybu Team, that customers want to see the Welsh language more prominently placed in our stores. This is why we have conducted a full rollout of new bilingual signs across all Lidl stores in Wales."*



## What are the barriers and what are the opportunities?

### Large Businesses

The issues faced by regional managers of large businesses range from considering the Welsh language in tender bids to political pressures and corporate responsibilities. For some it is the challenge of persuading the head office, often based outside Wales. They need to demonstrate how the Welsh language is a living, breathing language. They are looking for evidence to support a business case that will persuade the company directors. They appreciate the support received from the Hybu team and the feeling of being on a journey towards improving their services.

### Small and Medium Businesses

For some smaller businesses the fear of making mistakes is a barrier. They are concerned that a misspelt sign might lead to negativity from some customers. This may explain the small percentage who felt that the Welsh language had held them back. Fortunately, the Hybu team offers a free proof-reading service which is used by businesses and charities across Wales.<sup>5</sup>



**John Turner, Head of Region, Marks and Spencer:**

*“There is no doubt that Welsh language services are a customer requirement and that we need to meet their expectations.*

*It may not always be easy explaining this to my colleagues outside Wales, however evidence shows how the Welsh language is a benefit to our reputation and that it can win more customers to our stores.”*

## TOCYNNAU TICKETS

## What support is required by businesses?

The research shows that businesses need more support in the following areas

- 27% said that they needed more help in using the Welsh language as part of rapidly developing technology and social media platforms.
- 17% are looking to access good practice guidance on how to tackle issues such as bilingual design, recruitment and bidding for tenders.
- 26% said that they would like support in planning and implementing marketing campaigns.
- 21% are looking for new ideas on how to use the Welsh language to reach out and engage with new customers.



**Christian Dalton, Santander’s Regional Manager:**

*“The Welsh Language Commissioner’s Hybu Team has provided constructive feedback and acted as a middle ground between customers and Santander when issues have been raised. We’ve actively collaborated and shown a desire to improve the experience for customers in Santander in Wales.”*



**Carrie Probin, Sales & Marketing Executive Snowdon Railway:**

*“We’ve been delighted to be able to take advantage of the free proof-reading service offered by the Commissioner. It’s allowed us to be certain that the materials we’re producing in Welsh are correct, and means that we’re able to increase our use of the language which can only enhance the experience of our visitors from Wales and further beyond.”*

Cymraeg

We offer free resources that businesses can use to show who speaks Welsh within the workplace.

**For more information visit our website or call us on 0345 603 3221**

<sup>5</sup> www.welshlanguagecommissioner.wales/proofreading

# 5 things the Hybu team will focus on next

## Guidance: helping businesses to take full advantage of benefits of the Welsh language

We've already produced some popular guidance on bilingual design, social media and bidding for grants and contracts, to name a few. Based on the findings we will focus our attention on the best practice in recruiting Welsh speaking staff.

## Planning a marketing strategy and winning customers

We'll be teaming up with businesses that are keen to build on their base of Welsh speaking customers. We will help them create focussed and targeted marketing strategies.

## Recognise commitment and reward achievement

We have an online self assessment tool which has been used by over 600 organisations, large and small. Based on these assessments, many have put plans and policies in place. We want to give businesses the recognition they deserve for their efforts and showcase this amongst customers.

## Proofreading service: build confidence and ensure accuracy

We will be promoting our free proofreading service as widely as possible so that more and more businesses can develop their internal capacity to use Welsh.

## Working in partnership

We have strong working links with partners in Welsh Government, Business Wales, Welsh in Business and Visit Wales but we need to build on how we work together and draw on the expertise of leading companies in the fields of marketing, design and PR.

### What steps can you take next?

The evidence clearly supports the business case for investing in Welsh language services. This is based on consumer demand and the positive feedback from business leaders across Wales. The Hybu team can work with you to make sure that your investment pays off.

### For more information or to arrange a meeting please contact us:

[welshlanguagecommissioner.wales/hybu](http://welshlanguagecommissioner.wales/hybu)

phone: 0345 6033221

twitter: @hybucymraeg

## Available guidelines and research

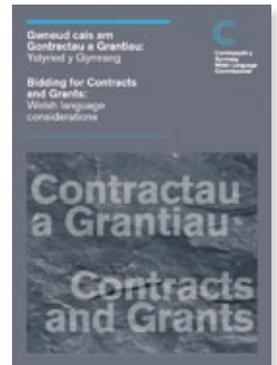
### Using the Welsh language on social media

A practical guide for businesses and charities on using Welsh on social media



### Bidding for Contracts and Grants

A guide for those working under contract or receiving grant in terms of the requirements that may be passed on to them to use the Welsh language.



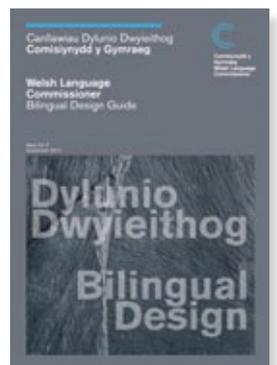
### Welsh in the shopping basket

Research findings to customers' attitudes to the use of Welsh by supermarkets



### Bilingual Design Guide

A guide that gives examples of good practice of bilingual design



CYMRAG

Byd Busnes  
In Business

## Support for small businesses

Welsh in Business is a project run by the Welsh Government. There are 12 officers based across Wales that focus on helping small businesses to use more Welsh.  
[info@businesswelsh.wales](mailto:info@businesswelsh.wales)