

Our time to act

**The position of the Welsh
Language 2021–25: Welsh
Language Commissioner's
5-year report**



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Foreword by the Commissioner

I am publishing this 5-year report on the verge of the 2026 Senedd election. An election that will, without doubt, be a significant moment in our history as a nation. The opinion polls consistently suggest that change is on the horizon. And while we will not know until May who will lead Wales for the next four years, we do know for certain that, for the first time, 96 Senedd Members will represent the people of Wales. These members will have been elected through a new voting system and will represent new constituencies. Constituencies with Welsh-only names: a symbolic sign, on the advent of a new Senedd, of national confidence and pride in our language.



New opportunities lie ahead: opportunities to think and act differently, for the benefit of many fields including the Welsh language. In saying this, I do not wish to overlook the significant and commendable efforts of the past five years. During this period, we have seen crucial policy and legislative developments as evidenced in this report; **however, further change is still needed.** The trajectory towards a million Welsh speakers is based on the assumption that there will be 680,000 Welsh speakers by the end of the next Senedd period. Yet, as this report again highlights, the 2021 Census recorded only 538,296 Welsh speakers in Wales. The next Welsh Government will need to deliver bold and transformative interventions in support of the Welsh language **if we are serious about doubling the daily use of Welsh and reaching a million Welsh speakers by 2050.**

I naturally have my own ideas about how meaningful change can be achieved, drawn from my day-to-day work advocating for the Welsh language. I have already published my [2026 Manifesto Proposals](#) which outline five ambitious yet practical proposals that have the potential to significantly improve the position of the Welsh language by the end of the next Senedd term. It is important to emphasise, however, that I am not suggesting that implementing these five proposals, nor achieving the objectives of my [new strategic plan](#), would in themselves be sufficient to transform the position of the Welsh language. The picture is far more complex, as this report demonstrates. The recommendations made here are therefore broader and more general in nature, as befits a 5-year report. My aim in this report is to identify and highlight the key priorities and opportunities for the period ahead, while committing to working through the detail of the necessary approaches and solutions with the new Government and other partners in due course. **The Welsh language must be placed at the heart of every policy and legislative agenda of the next Welsh Government if we are to see the real and lasting change needed,** and take another step towards a million speakers.

New ideas, new energy and new efforts are needed to achieve the change we desire. **My aim in this report is to provide a robust evidence base to support practical action that will benefit the Welsh language.** Drawing on data from the 2021 Census and other national surveys, together with insights from our policy-influencing and regulatory work, we aim to present as complete a picture as possible of the position of the Welsh language and the experiences of its speakers. **Only by having a full and balanced picture of the position of the Welsh language can we fully understand the challenges and opportunities facing our language during the next Senedd term.**

I have great ambition for the Welsh language and its speakers. I want to see a Wales where living through the medium of Welsh is a genuine, everyday choice for its people, and **I will remain unwavering in my commitment to achieving this.**

This is, therefore, an invitation to the new Welsh Government, Senedd members from all parties, policymakers and all of us with an interest in the Welsh language to engage with our analysis of its current position. Only by pausing to understand and consider the situation today can we plan effectively for a better tomorrow for our language.



Efa Gruffudd Jones

Welsh Language Commissioner

Introduction



Statutory duty

Section 5, part 2 of the Welsh Language (Wales) Measure 2011 sets out a specific statutory duty for the Commissioner to produce a report every five years on the position of the Welsh language. Additional requirements apply when the report follows a census. Such reports must include an analysis of the results of the census and provide an assessment their implications for the position of the Welsh language.

This is the third 5-year report published by the Welsh Language Commissioner, reporting on the period from 1 January 2021 to 31 December 2025. The **first reported** on the period between 1 April 2012, when the doors of the Commissioner’s office opened, and the end of December 2015; and the **second reported on the full five years** from 1 January 2016 to 31 December 2020.

The aim and structure of the report

For us, producing this report is about more than merely meeting a statutory obligation.

The unique responsibility to produce an independent and comprehensive report on the position of the Welsh language is one we have fully embraced. The main purpose of the report is to provide an independent analysis of the position of the Welsh language during the reporting period. However, we do not wish to report for reporting’s sake. We want our understanding of the position of the Welsh language to **provide a strong basis for bold and ambitious action.**

To achieve this, the report is structured in three main parts. **Part 1** provides an analysis of the results of the 2021 Census and our findings regarding their implications for the position of the Welsh language, in accordance with the requirements of the Measure. The analysis is an **attempt to examine the statistics in greater depth** and explore what we are able to understand about the position of the Welsh language and its speakers from the responses to the 2021 Census questionnaire. It also looks back at previous census statistics to give us an overview of the position of the language over several decades.

This first part on the census underpins the next two parts of the report. In the following two parts we **go beyond the numbers** to consider what we know about the Welsh language through other sources, including research reports, national surveys, and our own policy work and our regulatory duties.

Part 2 is dedicated to the key subject of Creating Welsh Speakers. Of course, the results of the 2021 Census – a census conducted around the beginning of the reporting period – are not sufficient to answer the question of whether or not progress has been made in this key area during the reporting period. This section is **therefore an opportunity to scrutinise some of the policy areas that are central to the efforts in creating more Welsh speakers.** It highlights important strategic areas such as language transmission within the family, the key role of childcare and early years education, the significant work taking place within the statutory and tertiary education sectors, and also the increasingly prominent contribution of the Welsh for adults sector. We will focus on each of these areas in turn considering whether we have evidence that the policies in place will

result in an increase in numbers by the 2031 Census. We evaluate the progress made during the reporting period **before highlighting the priorities and opportunities the Commissioner has identified for the next five years.**

Part 3 then turns to Increasing the Use of Welsh: the second strategic objective of *Cymraeg 2050* and a theme that is central to the work of the Welsh Language Commissioner with our main statutory aim of promoting and facilitating the use of the Welsh language. We scrutinise the statistical data on the use of the language from the Language Use Survey (2019–20), which is the primary authoritative source of data on the use of the Welsh language. Although the last Language Use Survey was actually conducted at the end of the reporting period of our previous five-year report, its results were not published until the beginning of this reporting period.

We also look at key policy developments aimed at increasing the daily use of the Welsh language, including language planning, the economy and housing, and service planning and the development of Welsh language workplaces. Given how central these are to the Commissioner's day-to-day work, it is natural that we have first-hand data and findings to share as a result of our work in implementing the Welsh Language (Wales) Measure 2011. Part 3 is therefore **an opportunity to pause and consider whether current policies are likely to lead to a doubling of the daily use of the Welsh language** and to outline emerging priorities and opportunities for the next five years.

Across Parts 2 and 3 we share seven case studies that aim to highlight people's experiences of the Welsh language and the significance of the language to them and their communities. After all, **it is people who speak a language and each of the 538,296** who indicated that they spoke Welsh in response to the 2021 Census questionnaire will have their own personal story about the language. These case studies have been selected to highlight why we have chosen to focus on three strategic themes in our Strategic Plan for 2025–30: **children and young people, the workplace, and health and care.** They also highlight why we have chosen our specific manifesto proposals, by showing how the Welsh language, and opportunities to use it, can make a real difference to the lives of individuals and communities.

The 2021 Census and the future of Welsh language data

The central pillar of this report is an analysis of the 2021 Census and the Welsh Government has made it clear that the census is the key source for measuring progress towards a million Welsh speakers.

However, the census data is not without its complexities and limitations. For example, we know that the number of people who report that they speak Welsh is consistently lower than the results of other household surveys, including the Annual Population Survey. And during the reporting period the Welsh Government committed to working with the Office for National Statistics on a **work plan** to look in greater detail at the differences between these data sources and consider how the gathering of information on Welsh language ability can be improved in the future.

The results of the 2021 Census are discussed in this report as if they were describing the position of the Welsh language today. But the results of the 2021 Census are a snapshot of one day – a singular day in many respects. Five years since the start of the COVID-19 pandemic, it's hard to recall how different life was during that unprecedented period.

We must also bear in mind that the census is a self-assessment questionnaire and that each and every one of us will give a subjective answer to the question about our Welsh language ability.

We all assess our language skills differently and it is quite likely that two individuals with similar Welsh language skills will give a completely different answer. We should also remember that an individual in a household may be providing an assessment of the skills of other members of that household. For example, parents will have been responsible for noting their children's linguistic ability and may not fully know how well a child can understand, speak, read or write Welsh.

Add to this the fact that there has been **uncertainty throughout this reporting period as to whether another full census of the population would be conducted in 2031**. It was only in July 2025 that the UK Government made the final decision to commission another census following the UK Statistics Authority's recommendation.

The Language Use Survey is another survey that we have no certainty as to when it will be carried out again. It was stated in the last 5-year report that our initial hope was that it would place particular emphasis on language use data, given that counting speakers would naturally be the main focus of all reports published following a census. Although the Welsh Government launched a Language Use Survey in spring 2019, that survey had to be discontinued prematurely as a result of the pandemic emergency restrictions. The results of that survey are discussed in Part 3 of this report, but the data is insufficient to fulfil the need for a comprehensive national Language Use Survey. For example, the sample size did not allow for analysis by local authority. **We are therefore still waiting for a full Language Use Survey that we can compare meaningfully with the survey carried out jointly between us and the Welsh Government between 2013 and 2015.**

At the time of publication, there were no firm plans in place to conduct another Language Use Survey. The National Survey, which forms the basis of the Language Use Survey, is currently being redesigned and therefore no fieldwork has taken place at all during the 2025–26 financial year. Fieldwork will resume in 2026–27 and we look forward to continued discussion with the new Welsh Government as to how and when a Language Use Survey may be included as part of the National Survey cycle to meet the national – and now statutory – need to report on the use of the Welsh language.

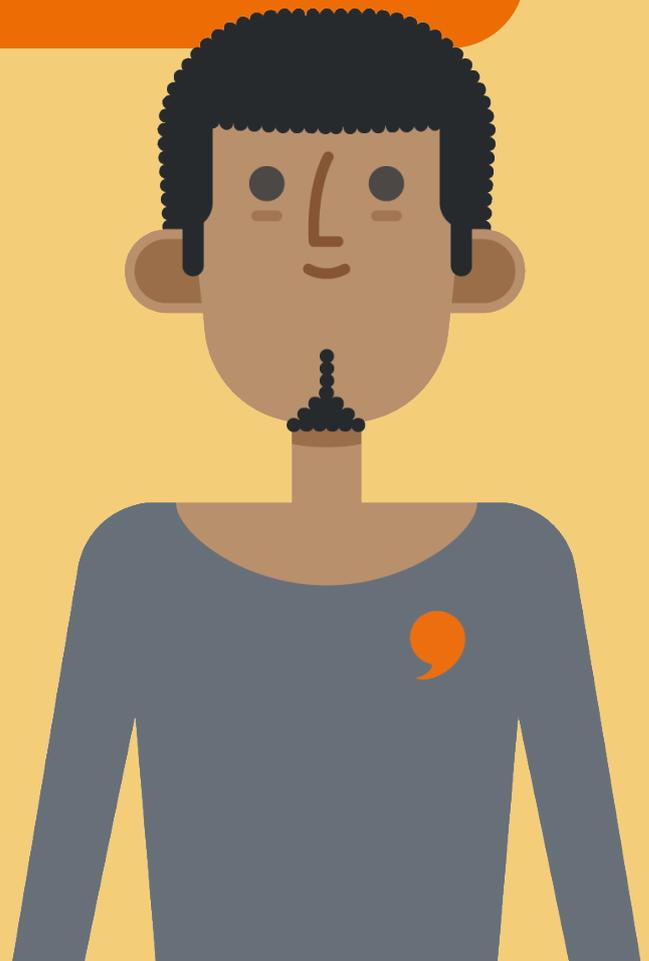
Given the data limitations of the current surveys, it follows that **other methods of measuring the position of the Welsh language should be considered**. The previous 5-year report discussed the perils of favouring quantitative research over qualitative research when examining the position of the Welsh language. **We only get part of the picture when we measure performance based on quantity or numbers**, it does not give us an idea of the practices, use, confidence, or behaviour of the individuals involved. Qualitative methods must be added in order to fully understand the true experience of individuals.

It was this dissatisfaction with the current situation in relation to data on the Welsh language that led us to support a piece of research by the Centre for Welsh Politics and Society on alternative methods of assessing the vitality of a language.¹ This work highlights the value of a language indicator system as a means of systematically combining various data sources to understand the position of a language, and explores the potential of Geographic Information Systems to link language data with other relevant data. It also identifies the **need to gather more robust data on the position of the Welsh language on a regular basis**, including data on language use.

It is inevitable that readers of this report will have additional evidence that would further enrich our understanding of the position of the Welsh language. **We therefore invite you to contact us if you have important information on the position of the Welsh language** that was not included in this report. We would be delighted to discuss this with you. After all, our ambition is that this report will lead to dialogue that will serve to benefit the position of the Welsh language over the next five years.

¹ E. Royles, Rh. Jones, and H. Lewis, , [Methods of Assessing Linguistic Vitality Report - Aberystwyth University](#) (Aberystwyth University, 2024).

Main findings and recommendations



The initial results of Census 2021 confirmed that we are not seeing the increase we desire in the number or the percentage of Welsh speakers in Wales. The detailed analysis of the census results presented in the first part of this report, together with the other data sources examined in the second part, provide an opportunity for us to better understand why this growth is not occurring and to and consider exactly where the losses and gains lie. Yet we must acknowledge that the picture is – at best – static.

Although the number of Welsh speakers has remained relatively stable for four decades, the overall population has grown significantly during the same period, leaving the position of the Welsh language undoubtedly more vulnerable. Simply put, population growth has not translated into an increase in the number of speakers. And the fact that population growth is driven largely by inward migration presents further challenges to the vitality of the language, especially in those areas traditionally regarded as the heartlands of the Welsh language. There is a real question as to how long some of these areas will continue to merit that description.

It naturally follows that the demographic shift described by the census has a direct and significant impact on the use of Welsh. The third part of this report focuses closely on this issue which is at the heart **of our mission in the office of the Welsh Language Commissioner**. Unfortunately, the data from the latest Language Use Survey is not available at local authority level, **but we know from research and experience that the use of Welsh as a natural community language is weakening**. This is particularly true in the context of our young people. Our own research, together with that of others, highlights that our young people increasingly live in a context where English is the language of play and entertainment – particularly in the digital world – which creates a real risk that the progress we see through the education system is confined within school walls.

Of course, none of these findings or concerns are new. And over the past five years we have seen the Welsh Government, and other stakeholders, introduce interventions aimed at addressing them. This raises the all-important question: **what more must we do to realise our great ambition for the Welsh language and its speakers?**

We cannot continue to operate in a similar fashion if we wish to see fundamentally different results.

Within this report, we have identified specific priorities that set out what needs to be achieved to secure the best outcomes – outcomes that go beyond maintaining and towards strengthening the position of our language. **There are ten priorities in total. They can be found listed together at the end of the report, and individually at the end of each section outlining the priorities and opportunities for strengthening the position of the Welsh language.**

Seeing these recommendations in context is essential: these are not ten arbitrary commandments. Language policy is a complex discipline, and the full picture is required before acting responsibly and planning the necessary multilayered interventions.

Our clear message to the new Welsh Government – and to all who want to see the Welsh language thrive – is that there are opportunities over the next five years to introduce bold and transformative interventions. The ten priorities belong to three strategic fields where there are real opportunities to create change.

Three main opportunities

1. Creating confident Welsh speakers through the education system
2. Strengthening the community use of Welsh
3. Creating workplaces that support the Welsh language



Creating confident Welsh speakers through the education system



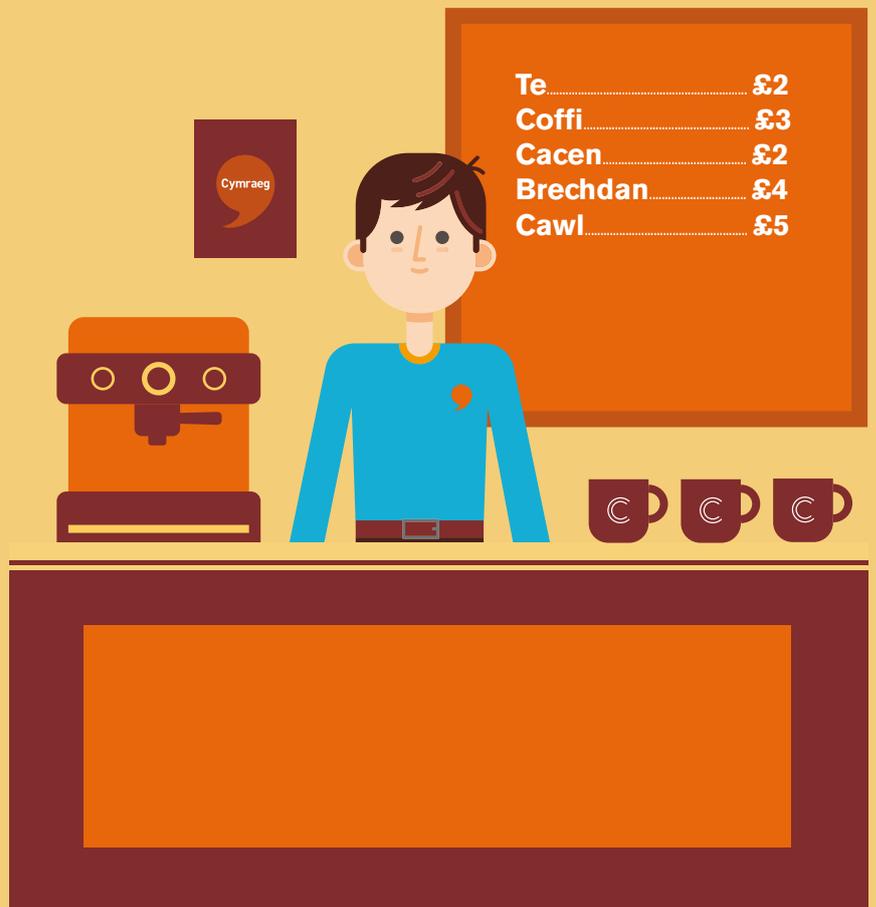
Our schools will create the Welsh speakers of the future. It is clear, therefore, that we need more Welsh medium schools. And to move schools along the language continuum and realise the bold ambition of *Cymraeg 2050* and the Welsh Language and Education Act (Wales) 2025, a revolution is required in how the Welsh language is taught in every school in Wales. Teachers – and the wider education workforce – are crucial to delivering this change.

Only by intervening directly in this area, and by ensuring an increasingly bilingual education workforce – including the early years and post-16 workforce – can the new Government have any hope of stimulating real change in the numbers leaving school as confident Welsh speakers. It is painfully obvious that current efforts are neither ambitious nor far-reaching enough to meet this challenge.

We therefore call on the next Welsh Government to establish a Welsh-language training framework as a compulsory element of the training, induction, and professional development of every teacher. This would provide an excellent opportunity for the teachers of the future to develop their skills and to contribute directly to transforming Wales's education system.



Strengthening the community use of Welsh



The Welsh language belongs to every part of Wales and to every community within it. To ensure that it continues to be transmitted naturally from generation to generation, and that it is used in every aspect of life, it is essential to safeguard those communities with a higher density of Welsh speakers. These communities are the powerhouses of the language – the backbone of Welsh– and nurturing them is vital to the health of the language across the country. For the Welsh language to thrive nationally, it must first thrive locally.

This was recognised during the reporting period with the establishment of the Commission for Welsh-speaking Communities, with the aim of strengthening our Welsh-speaking communities. The new Welsh Government now has an opportunity to build on the firm foundations laid by the Commission's thorough work. **Implementing the Commission's recommendations with conviction and ambition would provide a once-in-a-generation opportunity to address the decline of the Welsh language in its heartlands.** We call on the next Welsh Government to publish a white paper as early as possible during the next Senedd term, setting out a clear method for fully implementing the Commission's main recommendation to establish areas of higher density linguistic significance.

But there is also a need to ensure use of Welsh among the ‘communities’ of speakers who are geographically dispersed. We must provide and fund cultural, community and sporting experiences through the medium of Welsh, especially in areas where the percentage of Welsh speakers is relatively low, but the absolute numbers are comparatively high. **This is particularly important for children and young people, so that they can enjoy the Welsh language and see its relevance beyond the school gates.**

To meet this challenge, the next Welsh Government should focus on strengthening community language-planning frameworks, in line with another recommendation of the Commission for Welsh-speaking Communities. There is clear potential here to strengthen the promotional standards, that create duties for local authorities and national parks to promote and facilitate Welsh in their areas, so they become more effective vehicles for community language planning. Investment and resources must also be increased for key partners responsible for providing activities, events, entertainment, and digital content through the medium of Welsh.



Creating workplaces that support the Welsh language



Beyond school and the community, the workplace is one of the most influential environments for using the language in our daily lives. Many of us spend a large proportion of our day in some form of workplace – physical or virtual. The workplace therefore offers the most consistent, natural and influential opportunity to increase the daily use of Welsh. It is also the perfect context for young people to appreciate the value of the Welsh language they have gained through the education system.

When organisations create environments that actively welcomes the Welsh language, they create important new linguistic spaces. By encouraging and maintaining the use of the language at work, organisations and employers can play a vital role in reinforcing speakers' confidence and skills – as well as creating new speakers. New confidence and skills, together with a fresh appreciation of the value of Welsh, can significantly influence how people use the language beyond the workplace.

This opportunity is too good to be left to chance. A deliberate strategy is required if we are to make the contemporary workplace a cornerstone of the Welsh language. We need a new national policy that will lead to the creation of workplaces where the Welsh language is visible, natural, and valued. **We call on the next Welsh Government to provide additional investment to the Commissioner, enabling us to intensify our existing work in increasing the use of Welsh in workplaces.** This would enable

us to build on current efforts and to design and lead a coordinated strategy to target and support organisations of all kinds – including businesses and charities – to plan strategically to increase the use of Welsh in their workplaces.

Such a strategy would be an opportunity to capitalise on the potential of coordinating workplace-planning activities at a national level, building on the strategic cooperation that already occurs between key partners, including the Welsh Government, the Coleg Cymraeg Cenedlaethol, and the National Centre for Learning Welsh.

By ensuring a competent and skilled Welsh-speaking workforce across all sectors, Welsh-language services will be enhanced, and opportunities to use Welsh – along with its status – will increase. This is particularly crucial in key sectors such as health, where using Welsh is a matter of clinical need rather than choice.

There is no doubt that the statutory language duties placed on organisations as a result of the Welsh Language (Wales) Measure 2011 have led to a renewed appreciation of the importance of the workplace to the vitality of the Welsh language – and of the need for a skilled bilingual workforce capable of providing services to the public across a number of sectors. **A decade after introducing the Welsh language standards, it would be timely to review them to ensure that they remain relevant and accurately reflect how services are delivered today and in the future.** There is a clear opportunity for the next Welsh Government to increase opportunities to use Welsh in relation to services and the workplace by considering how additional organisations and sectors might be brought under the Welsh language standards.

A chance to break the cycle



These, then, are the major opportunities. The three priorities that must be pursued urgently in order to reverse the position of the Welsh language and ensure that it truly belongs to us all. **Of course, there are thousands of small things that we can – and should – do to drive the Welsh language forward.** But these are the three most critical in our view.

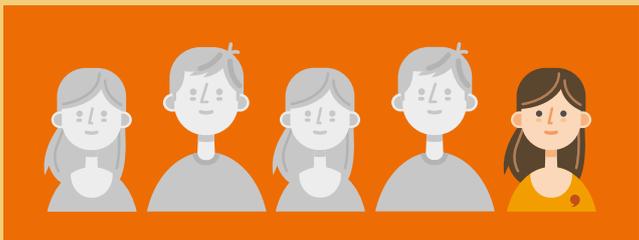
Only by acting strategically, ambitiously and collaboratively can we break the static cycle and ensure that Welsh remains a living, relevant language for future generations.

Part 1: Census 2021 and the Welsh language





3,107,494
people live in Wales



17.8%
17.8% of people aged three or over in Wales can speak Welsh

1 in 5



64.4%
people aged three or over speak Welsh in Gwynedd and **55.8%** in Anglesey

There are more Welsh speakers in Cardiff **(42,757)** than in Anglesey **(37,413)**



More than half of Welsh speakers are under the age of **33**

1. Background

This part of the report draws partly on an independent analysis provided to the Commissioner by the Centre for Welsh Politics and Society, Aberystwyth University.

It also draws on authoritative analyses published by Welsh Government statisticians, as well as the Prosiect BRO Compendium: **Prosiect BRO Compendium of Language Statistics based on Census 2021 data**.

The first bulletin on **Welsh in Wales (Census 2021)** was published by the Welsh Government in December 2022. The Commissioner has also ensured that everyone can easily access the data and create their own analyses through our **Data Dashboard: Who speaks Welsh in Wales?**

Our aim here is to pull together the key statistics and highlight those we consider most significant for understanding the current situation of the Welsh language. We will also take a closer look at some regional and local trends and place the results of the 2021 Census in the context of previous censuses.

2. Context of the 2021 Census

The 2021 Census was carried out during an exceptional and unprecedented moment in our history. On 21 March 2021 the coronavirus (COVID-19) pandemic had impacted every aspect of our lives. Many aspects of our lives had indeed moved online, and the entire population had been through prolonged periods of strict lockdowns where schools, workplaces and meeting places were closed. We can't know for certain how this affected the way people reported a number of things in the census, including their Welsh skills.

The limitations of census data are discussed in more detail in the introduction to this report. But despite its limitations, the census is the most authoritative and comprehensive way we have of understanding the population of the country.

The results of the 2021 Census describe the position of the country as it stood on 21 March 2021. A lot will have changed since then. To be precise, each statement in this section should be prefaced with wording such as 'On Census Day, 21 March 2021, X people aged three or older, who normally live in Wales reported...'. But for ease of reading – and until we get the results of the 2031 Census – these results are presented in the present tense, as if they were describing Wales today.

3. What is the population of Wales?

There are 3,107,494 people living in Wales. This is the highest population ever recorded in a census. This represents an increase of 1.4% or approximately 44,000 people since 2011: a significantly smaller increase than seen in the previous decade when there was a growth of 5.3% (around 153,000 people) between 2001 and 2011. Overall, the population of Wales has grown by 6.9% between 2001 and 2021. That equates to 197,294 more people.

More deaths than births occurred in Wales between 2011 and 2021, meaning that people moving to Wales (net positive migration) account for the population growth between 2011 and 2021 (around 55,000 people).

Of the population living in Wales today, 71% were born in Wales. 21% were born in England and 1% were born in the rest of the UK. This means that 7% of the population of Wales were born outside the UK (around 215,000 people in total). This is an increase of 28.3% born outside the UK since the 2011 Census.

The largest groups of international migrants to Wales come from Poland, with 24,832 or 0.8% of the total Welsh population coming from Poland. 13,000 come from India and 11,000 from Germany. Cardiff is the local authority that receives the highest number of international migrants, but Newport and Swansea are also home to many international migrants.

The largest population growth is in the south-east, with the largest increases seen in Newport (9.5%), Cardiff (4.7%) and Bridgend (4.5%). In contrast, the largest decrease in population was seen in Ceredigion (-5.8%), Blaenau Gwent (-4.2%), and Gwynedd (-3.7%). Although there has been an increase in the population of most local authorities in Wales, **it is significant that there has been a decrease in the population of Anglesey, Gwynedd and Ceredigion**, three local authorities that are considered traditional strongholds of the Welsh language.

The population of Wales is widely dispersed. On average, there were 150 people living per square kilometre in Wales in 2021. This is well below the population density in England, where 434 people live per square kilometre. But some areas of Wales are more populous than others to say the least. There are 2,572 people living per square kilometre in Cardiff compared with 26 people in Powys.

The census also highlights that the population of Wales is an ageing one with more of the Welsh population belonging to the older age groups than ever before. 21.3% of the population are over 65 years of age (18.4% were in this age group in 2011). At the other end of the spectrum, the percentage of the population under the age of 15 fell between 2011 and 2021. In 2021, 16.5% (513,800) of the population were under the age of 15 which is a decrease of 0.4% and 5,328 children compared with 2011.

The Commissioner's conclusions



As the population grows through migration while birth rates fall, effective interventions will need to be introduced to create more Welsh speakers.

As fewer children are born in Wales, we cannot rely on births to increase the number of Welsh speakers if the percentage of speakers remains stable. This makes it essential to focus on significantly increasing the percentage of children who can speak Welsh in order to achieve meaningful growth in speaker numbers.

Since 29% of today's population was born outside Wales, it is important to consider how best to introduce the Welsh language to those who move here. This is especially relevant in the traditional heartlands of the language where the percentages of people born outside Wales are higher than the national average, but where there are also numerous opportunities to practise using the language and become confident speakers.

4. How many people can speak Welsh?

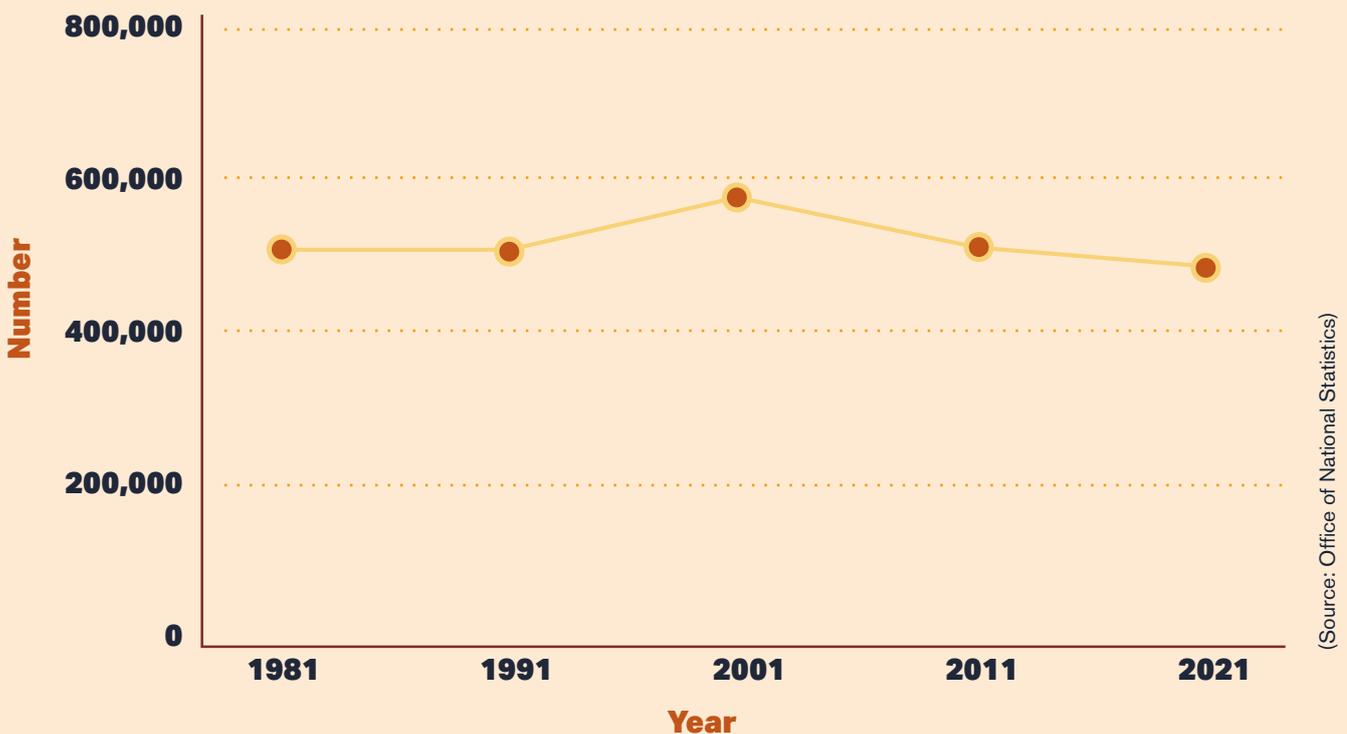
538,296 people are able to speak Welsh in Wales, which is 17.8% of the population aged three or over. This is a decline of 1.2 percentage points (23,720 people) since the 2011 Census and is the **lowest percentage of Welsh speakers ever recorded in a census.** But this is **not the lowest number of speakers to be recorded in a census.** Compare with the 508,197 recorded in 1981.

Looking back over four decades, we can see that the *number* of people able to speak Welsh in Wales between 1981 and 2021 has remained relatively stable. There was a notable increase of 74,270 in the number of Welsh speakers between 1991 and 2001, but the number gradually declined in subsequent decades, with the most significant decrease seen between 2011 and 2021. That said, the number of Welsh speakers in 2021 was still greater than the number recorded in 1981 (30,099 more people).

Chart 1: Percentage of people aged three years or older able to speak Welsh in Wales, 1981–2021



Chart 2: Number of people aged three years or older able to speak Welsh in Wales, 1981–2021



The population of Wales has grown significantly since 1981, however, which means that the **percentage of the population who can speak Welsh has decreased although numbers have remained relatively stable**. In 1981, there were 2,749,640 people living in Wales and of those aged three or over 18.9% were able to speak Welsh. By 2021, the population had grown to 3,107,494 with 17.8% able to speak the language.

It is therefore worth emphasizing that between 1981 and 2021 the percentage has fallen by only 1.1 percentage points. The percentage decline between 2011 and 2021 of 1.2 percentage points is also smaller than the decrease seen between 2001 and 2011 where there was a decrease of 1.8 percentage points.

Table 1: Number and percentage of people aged three years or older able to speak Welsh in Wales, 1981–2021

Census	Total usual residents aged 3 and over	Can speak Welsh	
		Number	Percentage
1981	2,685,390	508,197	18.9
1991	2,723,623	508,098	18.7
2001	2,805,701	582,368	20.8
2011	2,955,841	562,016	19.0
2021	3,018,172	538,296	17.8

(Source: Office of National Statistics)

Table 2: Change in the number and percentage of people aged three years or older able to speak Welsh in Wales, 1981–2021

Census	Person change	Percentage point change
1981–1991	-99	-0.2
1991–2001	74,270	2.1
2001–2011	-20,352	-1.8
2011–2021	-23,720	-1.2
1981–2021	30,099	-1.1

(Source: Office of National Statistics)

The Commissioner's conclusions



The fact that the number of Welsh speakers has remained broadly stable since 1981, despite the significant population growth, shows that the **growth in the population does not translate into growth in the number of Welsh speakers**. We need to consider how to harness population growth and create more Welsh speakers.

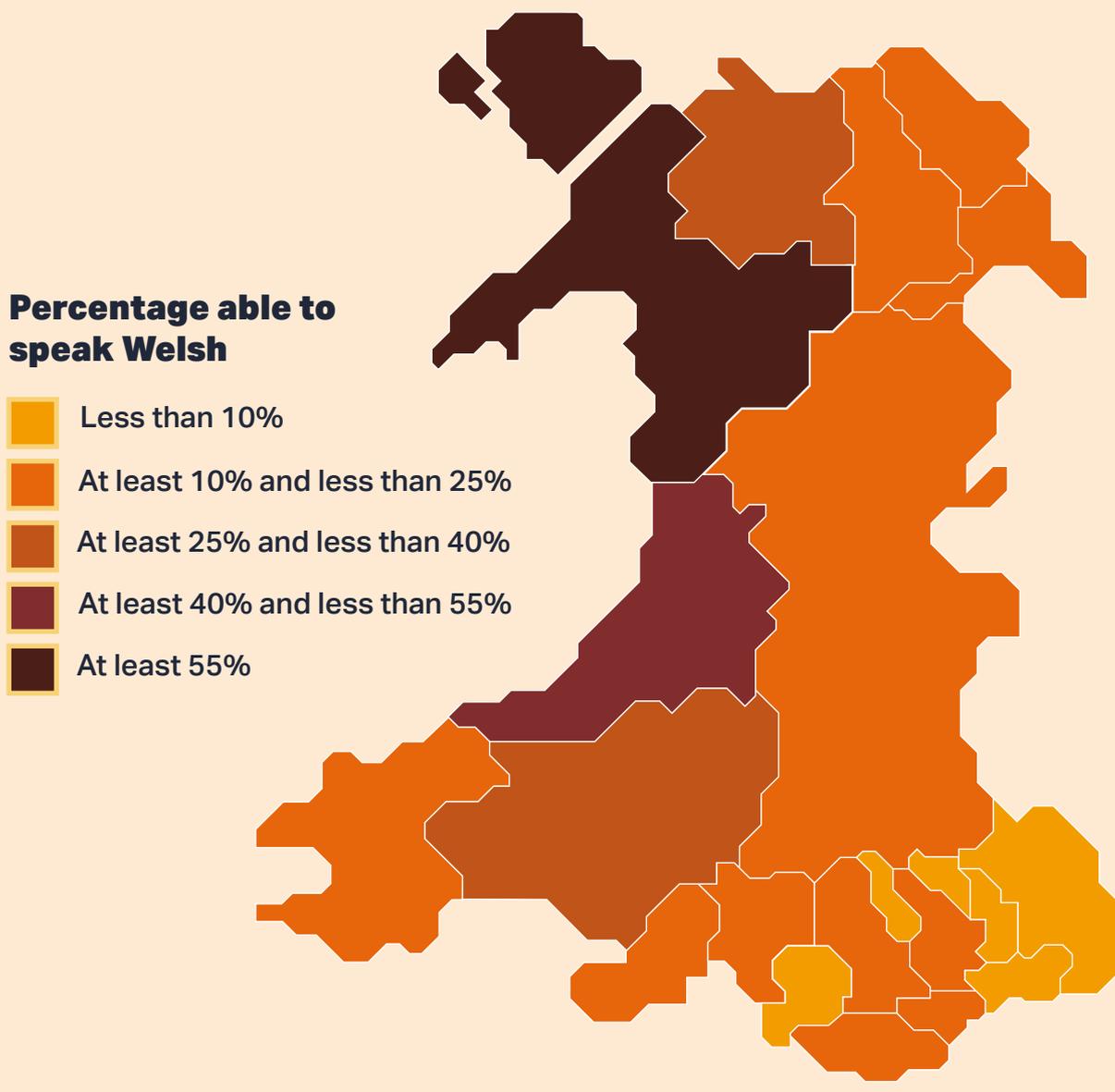
It is fairly positive that the decline in the percentage of Welsh speakers is smaller between 2011 and 2021 than seen in the previous decade, but the aim is not merely to halt the decline of course, and **significant and ambitious interventions are required to turn decline into progress by the 2031 Census**.

In drawing up the *Cymraeg 2050* strategy, the Welsh Government proposed a projection for the trajectory to the million which was based on the assumption that there would be 580,000 Welsh speakers by 2021, and that would represent 19% of the population. This means that there is a shortfall of 41,700 people and 1.2 percentage points between the projection and the 2021 Census results.

5. Where do Welsh speakers live?

5.1 Percentage of speakers by local authority

Map 1: Percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by local authority

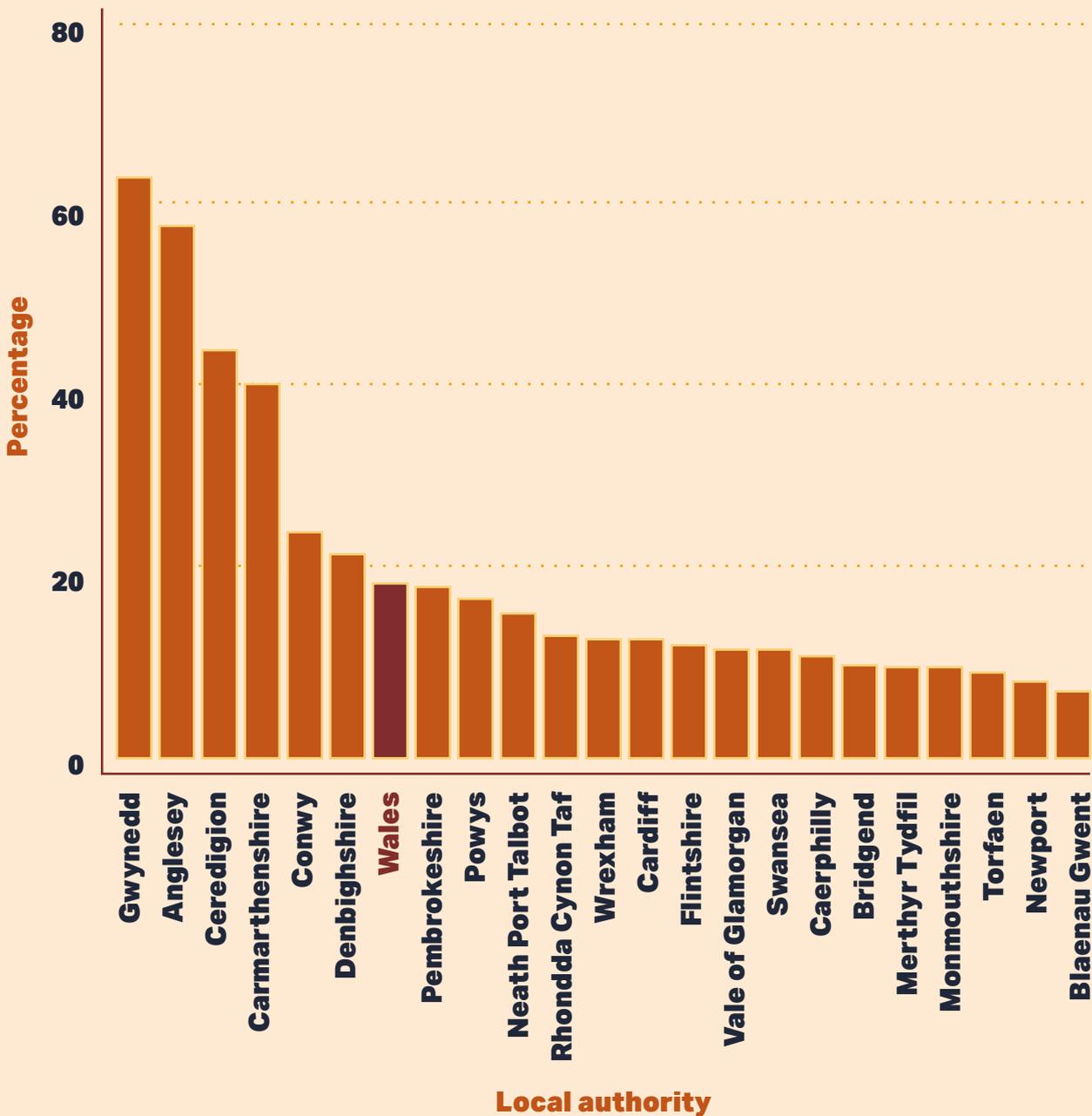


The highest percentages of Welsh speakers continue to be found in the local authorities of west Wales, reflecting the pattern seen in the 2011 Census. **More than half the population of Gwynedd and Anglesey can speak Welsh**, with 64.4% able to speak Welsh in Gwynedd and 55.8% in Anglesey.

Only one local authority falls into the category of 40–55% of speakers today with 45.3% of the population of Ceredigion able to speak Welsh. Carmarthenshire has slipped slightly below this threshold with 39.9% of the population able to speak the language, and Conwy also sits within the 25–40% category.

The percentage of Welsh speakers is below 25% in 17 of the 22 local authorities in Wales.

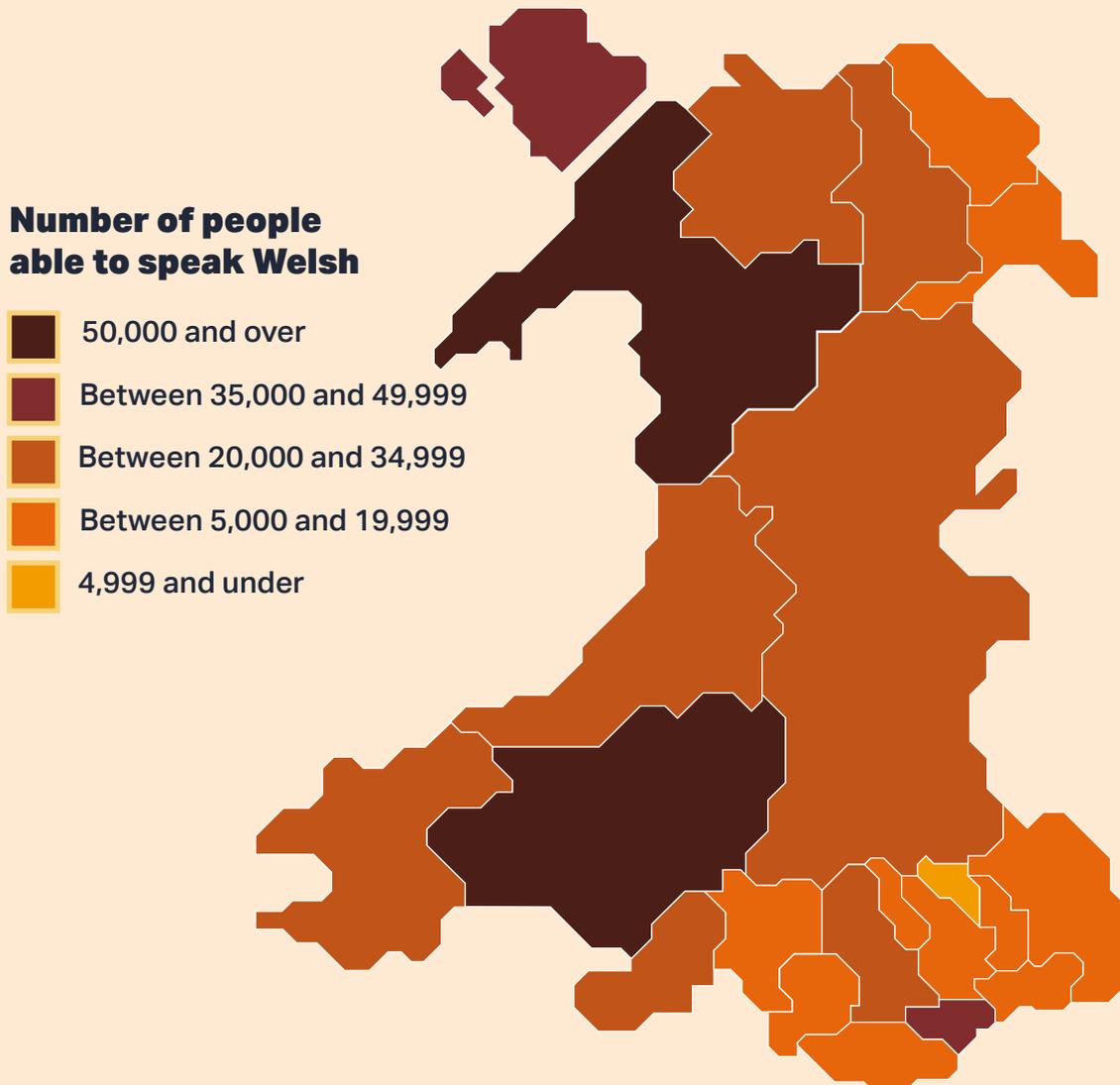
Chart 3: Percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by local authority



(Source: Office of National Statistics)

5.2 Number of speakers by local authority

Map 2: Number of people aged three years or older able to speak Welsh in Wales according to Census 2021, by local authority



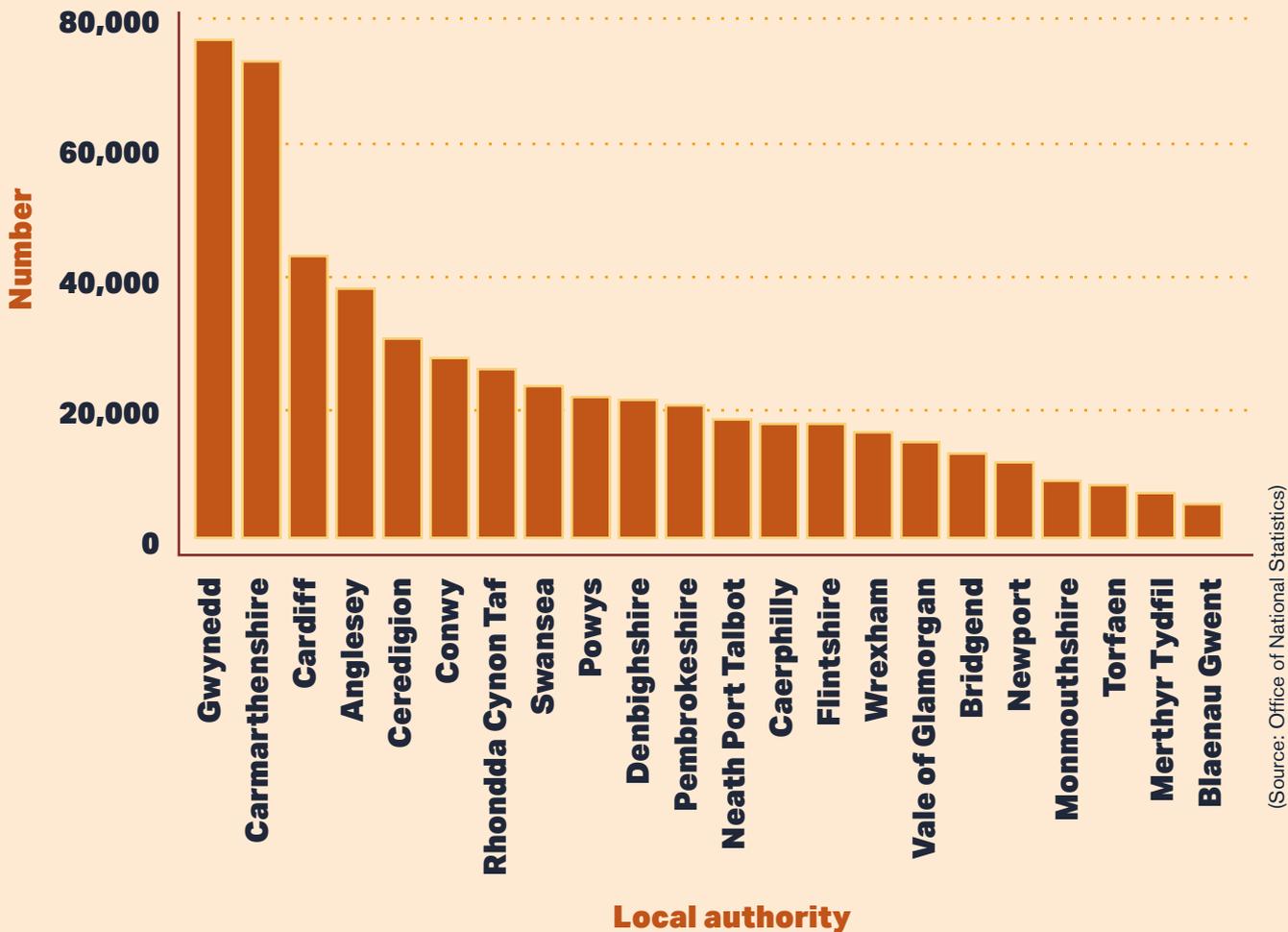
(Source: Office of National Statistics)

The picture looks quite different when considering the *numbers* of speakers at local authority level. **The highest numbers of speakers are in Gwynedd and Carmarthenshire** with over 70,000 speakers living in each local authority.

There are more than 35,000 speakers in both Cardiff and Anglesey; two local authorities that are opposite ends of the scale in terms of the percentage of speakers. It has already been noted that 55.8% of the population of Anglesey can speak Welsh, but although only 12.2% can speak the language in Cardiff, **there are now more Welsh speakers living in Cardiff than in Anglesey.**

Significant numbers of Welsh speakers also live in other local authorities across the country beyond what are traditionally regarded as the heartlands of the Welsh language in west Wales. Seven local authorities each have between 20,000 and 32,000 speakers. There are 20,626 speakers in Pembrokeshire, for example, 20,946 in Denbighshire, 25,986 in Swansea, and as many as 28,556 in Rhondda Cynon Taf.

Chart 4: Number of people aged three years or older able to speak Welsh in Wales according to Census 2021, by local authority



5.3 Change in the percentage and number of speakers by local authority between 2011 and 2021

In Gwynedd, which has the highest number and percentage of Welsh speakers (64.4%), there has been a relatively small decrease since 2011 – a drop of 1 percentage point or 3,440 speakers. It is worth noting that this coincides with an overall decline in Gwynedd's population over the decade. In 2011 there were 121,900 people living in Gwynedd; by 2021 the total had dropped to 117,400, a decrease of 3.7% or 4,500 people.¹

A similar situation is seen in Anglesey and in Ceredigion, both of which have experienced reductions in their total populations since 2011. As might be expected, these declines are accompanied by decreases in the numbers of Welsh speakers. There was a decrease of 1,155 speakers in Anglesey which amounts to 1.4 percentage points, while in Ceredigion there was a larger decrease of 2 percentage points or 3,286 speakers.

¹ Gwynedd population change, Census 2021 – ONS.

Although Carmarthenshire has the second-highest number of Welsh speakers (72,838), this is where the largest drop in the number and percentage of speakers has occurred, a decrease of 5,210 people or 4 percentage points since 2011. Carmarthenshire's population grew over the decade, at a higher rate than the national rate. While the population of Wales grew by 1.4%, the population of Carmarthenshire grew by 2.2%.²

Turning to the areas where there has been an increase in the number or percentage of Welsh speakers since 2011, it is worth looking closer at parts of the south-east. **There has been an increase in the number of speakers in four of Wales's local authorities, all of which are in the south-east:** Cardiff, the Vale of Glamorgan, Rhondda Cynon Taf and Merthyr Tydfil.

A relatively modest growth was seen in three of these local authorities, however. Only 51 additional speakers were recorded in Merthyr Tydfil; there were 777 additional speakers in Rhondda Cynon Taf which is a slight increase of 0.1 percentage points, and an additional 1,548 speakers in the Vale of Glamorgan, an increase of 0.7 percentage points.

Cardiff, however, saw a far more significant increase of 6,022 speakers, representing an increase of 1.1 percentage points. There has also been a significant increase in the size of Cardiff's population. In 2011 there were 346,100 people living in Cardiff; by 2021 the total had increased to 362,400, an increase of 4.7% or 16,300 people.³

Cardiff is now the local authority with the third-largest number of Welsh speakers. The comparison with Anglesey has already been noted but it is also worth noting that this also means that **Cardiff has 11,079 more speakers than Ceredigion.**

Beyond this increase in four local authorities in the south-east, and the 4 percentage points decrease seen in Carmarthenshire, the percentage decline in Welsh speakers in the rest of Wales's local authorities is relatively stable and ranges from a decrease of 0.2 percentage points in Swansea to a decrease of 2.2 percentage points in Powys.

Blaenau Gwent and Merthyr Tydfil have the lowest numbers of people able to speak Welsh at local authority level. 4,035 of Blaenau Gwent's population can speak Welsh, that's 6.2% of the population which is a decrease of 1.6 percentage points since 2011. The total population of Blaenau Gwent also decreased during the period. There are around a thousand more Welsh speakers in Merthyr Tydfil with 5,079 or 8.9% of the population able to speak the language, which is relatively stable since 2011. The total population of Merthyr Tydfil has also been stable over the decade.

Newport was the authority that saw the largest increase in its total population between 2011 and 2021 with an increase of 13,900 people or 9.5%.⁴ Although it has the second-lowest percentage of Welsh speakers (7.5%, a decrease of 1.8 percentage points since 2011), 11,594 people are able to speak Welsh there.

² Carmarthenshire population change, Census 2021 – ONS.

³ Cardiff population change, Census 2021 – ONS.

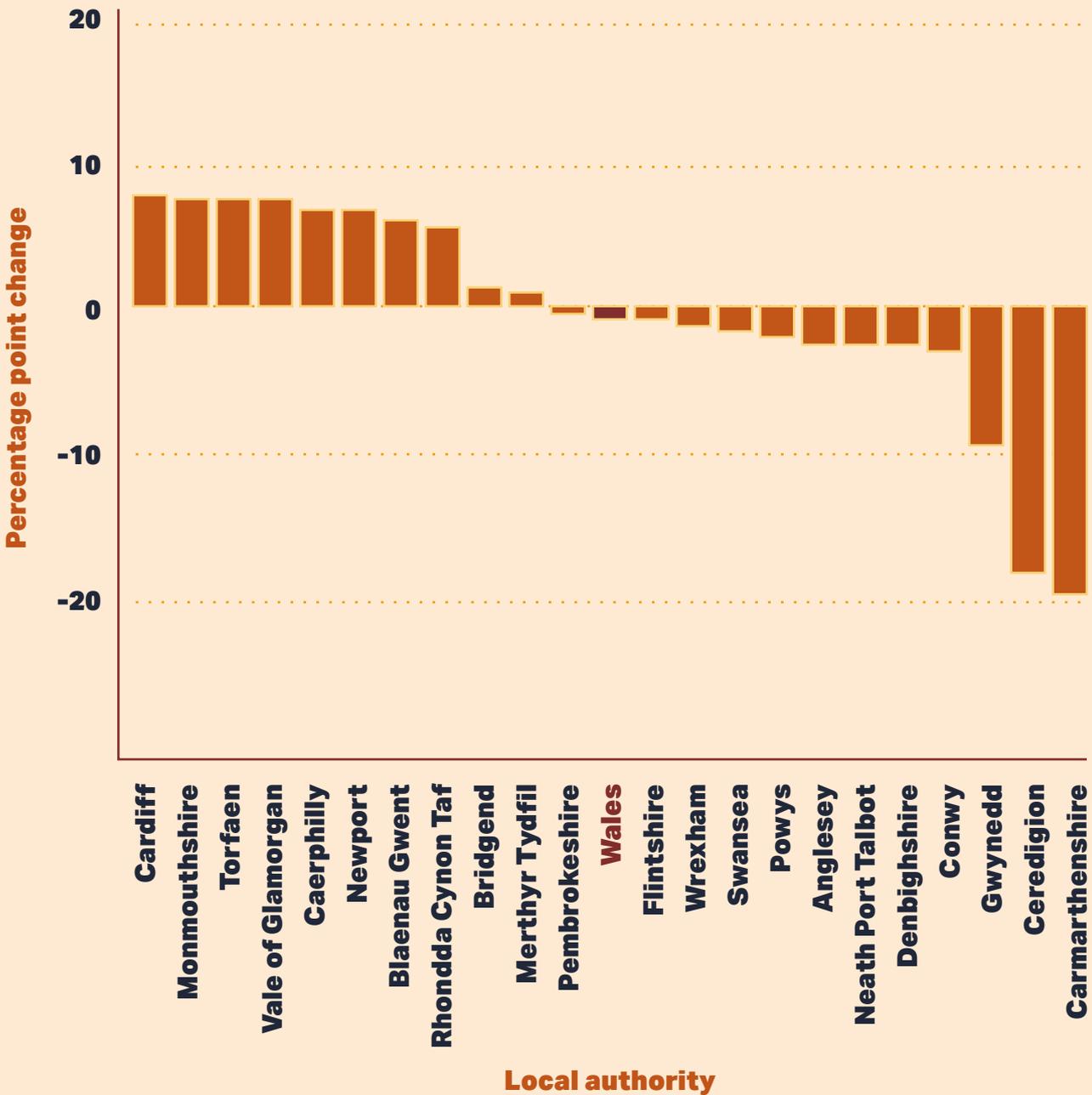
⁴ Newport population change, Census 2021 – ONS.

Table 4: Comparison of the percentage of people aged three years or older able to speak Welsh in Wales by local authority, 1981–2021

Local authority	Percentage				
	1981	1991	2001	2011	2021
Anglesey	61.0	62.0	60.1	57.2	55.8
Gwynedd	73.8	72.1	69.0	65.4	64.4
Conwy	31.6	30.6	29.4	27.4	25.9
Denbighshire	28.2	26.9	26.4	24.6	22.5
Flintshire	12.7	13.5	14.4	13.2	11.6
Wrexham	14.7	13.8	14.6	12.9	12.2
Powys	20.7	20.7	21.1	18.6	16.4
Ceredigion	63.2	59.1	52.0	47.3	45.3
Pembrokeshire	18.0	18.3	21.8	19.2	17.2
Carmarthenshire	59.0	54.8	50.3	43.9	39.9
Swansea	14.7	13.3	13.4	11.4	11.2
Neath Port Talbot	19.1	17.9	18.0	15.3	13.5
Bridgend	8.2	8.3	10.8	9.7	9.2
Vale of Glamorgan	5.9	6.8	11.3	10.8	11.5
Cardiff	5.9	6.6	11.0	11.1	12.2
Rhondda Cynon Taf	9.1	9.0	12.5	12.3	12.4
Merthyr Tydfil	8.4	7.5	10.2	8.9	8.9
Caerphilly	5.3	6.0	11.2	11.2	10.4
Blaenau Gwent	2.2	2.2	9.5	7.8	6.2
Torfaen	2.5	2.4	11.1	9.8	8.2
Monmouthshire	2.8	2.2	9.3	9.9	8.7
Newport	2.4	2.3	10.0	9.3	7.5

5.4 Change in the percentage and number of speakers by local authority over time

Chart 5: Change in the percentage of people aged three years or older able to speak Welsh in Wales, by local authority (percentage point change), 1981–2021



(Source: Office of National Statistics)

Looking in more detail at long-term changes in the percentages of Welsh speakers **between 1981 and 2021, we can see again that Carmarthenshire has experienced the largest drop in the percentage of Welsh speakers**, a decrease of 19.1 percentage points. The number and percentage of speakers in Carmarthenshire have fallen steadily every decade since 1981 with the largest drop seen between 2001 and 2011 where the percentage fell from 50.3% to 43.9% (a decrease of 6.4 percentage points). Notably, this decade also saw the largest increase in Carmarthenshire's population, with 6.3% more people living there in 2011 than in 2001. Carmarthenshire's population has grown steadily since 1981.⁵

Ceredigion saw the second-largest drop in the percentage of Welsh speakers in the same period. With a decrease of 17.9 percentage points between 1981 and 2021, it is the only other local authority to see a decrease of between 10 and 20 percentage points. And as in Carmarthenshire, the percentage of speakers has fallen every decade. Although the number of speakers rose in Ceredigion over two decades between 1981 and 2001, the decrease in numbers over the following two decades exceeded the increase in previous years resulting in 3,479 fewer speakers in 2021 than in 1981.

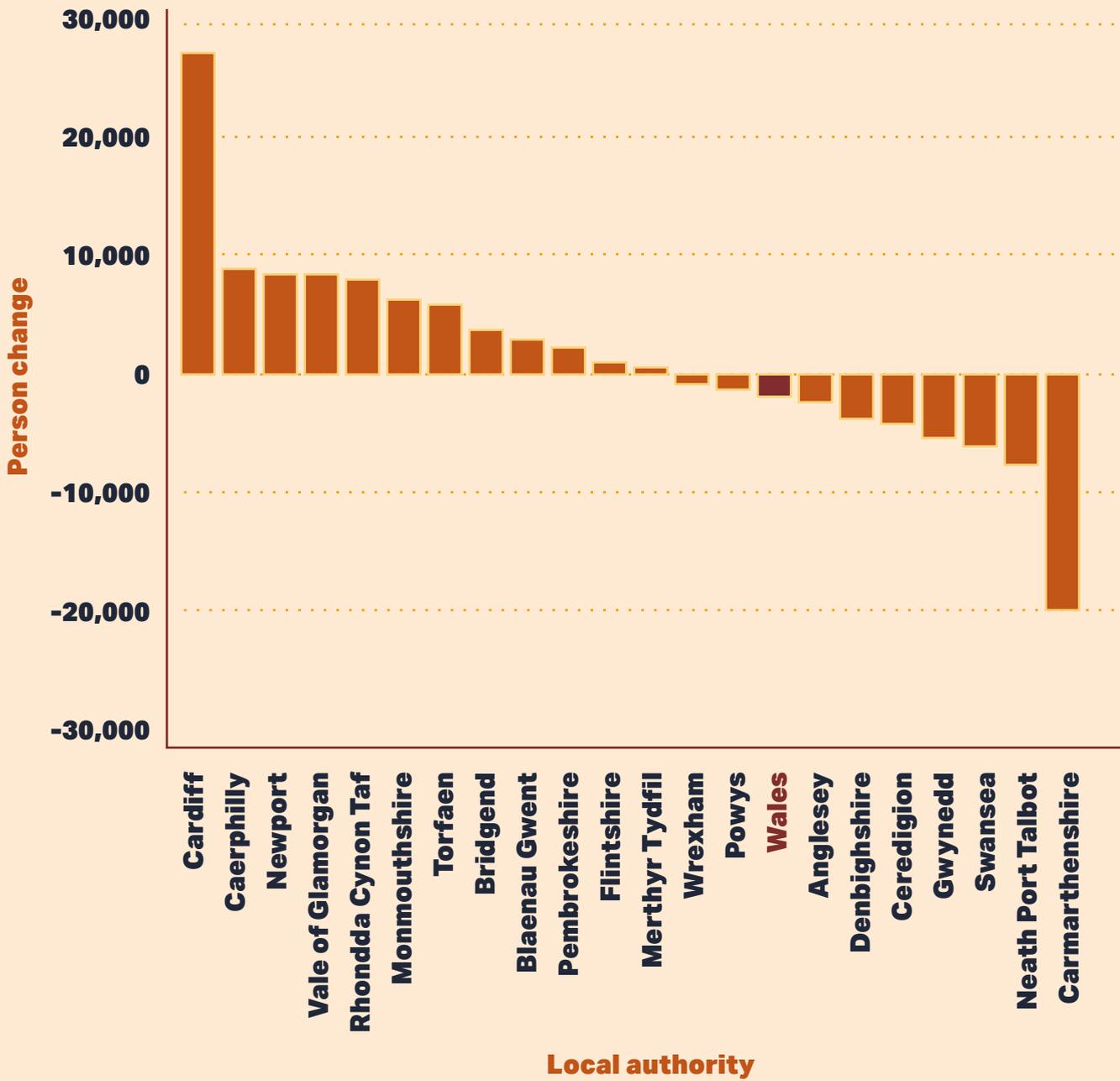
The local authority with the third-largest decrease in the percentage of Welsh speakers in the same period was Gwynedd with a decrease of 9.4 percentage points. The 1 percentage point decline seen between 2011 and 2021 is less severe than the decline seen in the previous two decades. There was a decrease of 3.1 percentage points between 1991 and 2001 and a decrease of 3.6 percentage points between 2001 and 2011.

However, the total population of Gwynedd grew between 1991 and 2011 (by 8,543 people),⁶ and when that is combined with a decrease of 1,719 Welsh speakers in the same period, a higher percentage reduction is to be expected. The loss of fewer than 1,000 speakers in a decade amounted to a decline of over 3 percentage points.

⁵ Carmarthenshire census population profile - 1981 to 2021.

⁶ Gwynedd census population profile - 1981 to 2021.

Chart 6: Change in the number of people aged three years or older able to speak Welsh in Wales, by local authority, 1981–2021



(Source: Office of National Statistics)

Although the percentage decline in Gwynedd is not as severe between 2011 and 2021, this is the period where we have seen the largest drop in the number of speakers. By 2021, there were 3,440 fewer people speaking Welsh in Gwynedd than in 2011. This was the first period in which the population size of Gwynedd also decreased, of course.

Looking at the local authorities where there has been an increase **between 1981 and 2021, the largest increase is in the percentage of Welsh speakers in Cardiff**, an increase of 6.3 percentage points. A further nine local authorities also saw increases ranging from 5.9 percentage points in Monmouthshire to 0.5 in Merthyr Tydfil.

All ten local authorities where there has been an increase since 1981 are located in south-east Wales and they all saw a significant rise in numbers and percentages between 1991 and 2001. In most cases, this is the increase that accounts for the overall increase over the four decades up to 2021. Only two local authorities have seen a steady increase in the number of Welsh speakers over each decade, namely Cardiff and the Vale of Glamorgan.

But while the increase in other south-east local authorities has not been consistent and there have been decreases in some decades, the overall increase is significant in some of the local authorities since 1981. Caerphilly, for example, saw an increase of 9,300 speakers and there has been an increase of between 7,800 and 8,600 speakers in Rhondda Cynon Taf, the Vale of Glamorgan and Newport.

Perhaps the most striking data in terms of changes in the number of Welsh speakers by local authority over these four decades is the **increase of 27,044 in Cardiff**, which coincides with the overall increase in the south-east local authorities, and the **decrease of 20,424 in Carmarthenshire**.

There is a significant gap between the extent of the decline in Carmarthenshire and the decline in other neighbouring authorities, however, with a decrease of 7,308 speakers in Neath Port Talbot and 6,100 in Swansea. Also bordering Carmarthenshire is Pembrokeshire which has seen an increase of 1,772 speakers since 1981.

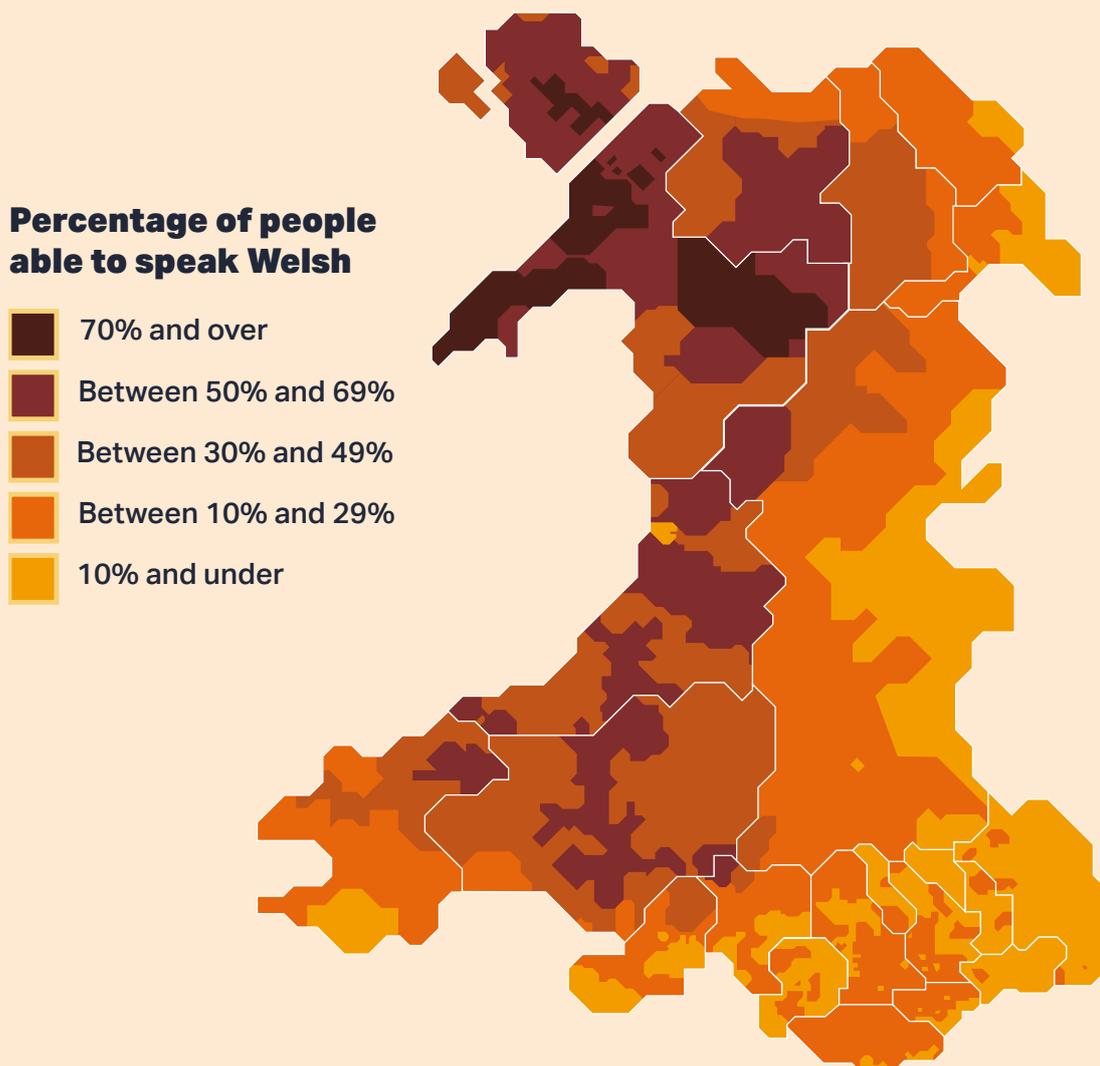
The same discrepancy exists when comparing the decline in Carmarthenshire with the decrease in the other local authorities that are traditionally considered to be strongholds of the Welsh language. There has been a considerably smaller decrease of 4,989 speakers in Gwynedd, 3,479 in Ceredigion and 1,915 in Anglesey since 1981.

5.5 Numbers and percentages of Welsh speakers at a more local level, by Lower Super Output Areas (small areas)

Lower Super Output Areas ('small areas') are small geographical areas containing between 400 and 1,200 households and between 1,000 and 3,000 usual residents. These areas are determined by the Office for National Statistics based on the number of households and residents, and it must be emphasised that the areas do not correspond to *communities* as such, so some care is needed when using the data to try to analyse community use of the language.

But the advantage of mapping at this smaller geographical scale is that changes in the percentages of Welsh speakers can be discerned in far greater detail than at the local authority level.⁷ Patterns seen on local authority levels can mask more local patterns, which are significant in terms of language use.

Map 3: Percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by LSOA



(Source: Office of National Statistics)

⁷ As a result of population and household changes since 2011, changes were made to some LSOAs by 2021 by combining or splitting some LSOAs to reach certain thresholds. While the total number of Welsh LSOAs only increased by 8 from 1,909 to 1,917 between 2011 and 2021, there have been changes to the boundaries of LSOAs in 15 of Wales's 22 local authorities. This needs to be taken into account when trying to compare these areas between 2011 and 2021. 1,837 areas remained consistent between the two censuses, but focusing on those would present an incomplete and unsatisfactory analysis.

The patterns illustrated in Map 3 mirror many of those already seen in Map 1 with higher percentages of Welsh speakers in west and north-west Wales. But you can also see small pockets within these local authorities where the Welsh language is fairly prosperous with **small areas where over 70% speak Welsh, on the Llŷn Peninsula, parts of Meirionnydd, Arfon and smaller parts of Anglesey.**

The map also shows pockets of fairly flourishing numbers of Welsh speakers in local authorities that otherwise have lower percentages of Welsh speakers, including parts of north Pembrokeshire, north-west Powys and north Swansea.

The small area with the highest density of Welsh speakers is found in Caernarfon, where 86.3% of people can speak the language. **The small area with the lowest percentage of speakers is found in a part of Ebbw Vale in Blaenau Gwent,** where 3.8% can speak Welsh.

Reference has already been made to the increase in the number and percentage of speakers in Cardiff, and **looking at the small areas of the capital city, the highest percentages of Welsh speakers are found in an area within Victoria Park in Canton** where 34.7% can speak Welsh, and in a part of Whitchurch and Tongwynlais where 31% can speak the language.

Map 4 illustrates where Welsh speakers live based on numbers. It emphasises again the significance of Gwynedd and Anglesey as strongholds of the Welsh language. But it is also effective to emphasise the significance of other areas in terms of numbers: the north Wales coast; north-east Wales; east Carmarthenshire and Swansea; and Cardiff and the valleys.

Map 4: Number of people aged three years or older able to speak Welsh in Wales according to Census 2021, by LSOA



(Source: Office of National Statistics)

Table 7: Number and percentage of small areas, by number and percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by local authority

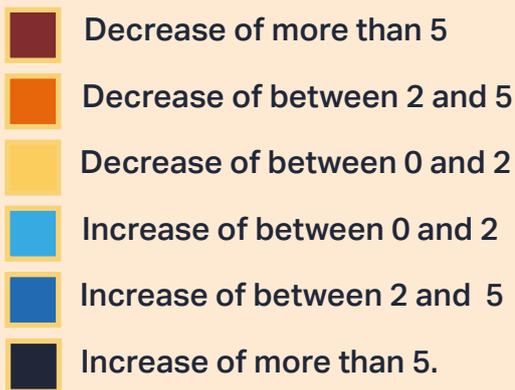
Local authority	Percentage able to speak Welsh											Total
	Under 25%		25–39%		40–59%		60–69%		70%+			
	Number and percentage of small areas											
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Anglesey	0	0.0	7	17.1	20	48.8	8	19.5	6	14.6	41	100
Gwynedd	2	2.8	4	5.6	16	22.5	15	21.1	34	47.9	71	100
Conwy	49	69.0	10	14.1	8	11.3	4	5.6	0	0.0	71	100
Denbighshire	40	69.0	10	17.2	8	13.8	0	0.0	0	0.0	58	100
Flintshire	91	98.9	1	1.1	0	0.0	0	0.0	0	0.0	92	100
Wrexham	82	97.6	2	2.4	0	0.0	0	0.0	0	0.0	84	100
Powys	66	83.5	9	11.4	4	5.1	0	0.0	0	0.0	79	100
Ceredigion	4	8.9	4	8.9	37	82.2	0	0.0	0	0.0	45	100
Pembrokeshire	56	78.9	6	8.5	9	12.7	0	0.0	0	0.0	71	100
Carmarthenshire	21	18.9	32	28.8	53	47.7	5	4.5	0	0.0	111	100
Swansea	146	97.3	4	2.7	0	0.0	0	0.0	0	0.0	150	100
Neath Port Talbot	80	88.9	6	6.7	4	4.4	0	0.0	0	0.0	90	100
Bridgend	91	100.0	0	0.0	0	0.0	0	0.0	0	0.0	91	100
Vale of Glamorgan	82	100.0	0	0.0	0	0.0	0	0.0	0	0.0	82	100
Cardiff	211	96.8	7	3.2	0	0.0	0	0.0	0	0.0	218	100
Rhondda Cynon Taf	150	98.0	3	2.0	0	0.0	0	0.0	0	0.0	153	100
Merthyr Tydfil	36	100.0	0	0.0	0	0.0	0	0.0	0	0.0	36	100
Caerphilly	110	100.0	0	0.0	0	0.0	0	0.0	0	0.0	110	100
Blaenau Gwent	46	100.0	0	0.0	0	0.0	0	0.0	0	0.0	46	100
Torfaen	60	100.0	0	0.0	0	0.0	0	0.0	0	0.0	60	100
Monmouthshire	58	100.0	0	0.0	0	0.0	0	0.0	0	0.0	58	100
Newport	100	100.0	0	0.0	0	0.0	0	0.0	0	0.0	100	100
Total	1581	82.5	105	5.5	159	8.3	32	1.7	40	2.1	1917	100

5.6 Percentage of speakers by Lower Super Output Areas (small areas) in 2021 and 2011

Map 5 illustrates the changes in the percentage of the population able to speak Welsh between 2011 and 2021. It shows small pockets of decline in local authorities which, otherwise, have seen an increase in the percentage of speakers. Conversely, it also reveals small areas of growth in local authorities which have experienced an overall decline in the percentage of speakers.

Map 5: Change in the percentage of people aged three years or older able to speak Welsh in Wales, by LSOA (percentage point change), 2011–21

Change (percentage point)



Please note: the data in Map 5 is based only on small areas that remained unchanged between 2011 and 2021. It was not possible to account for changes in areas that were combined between 2011 and 2021. These appear in white.

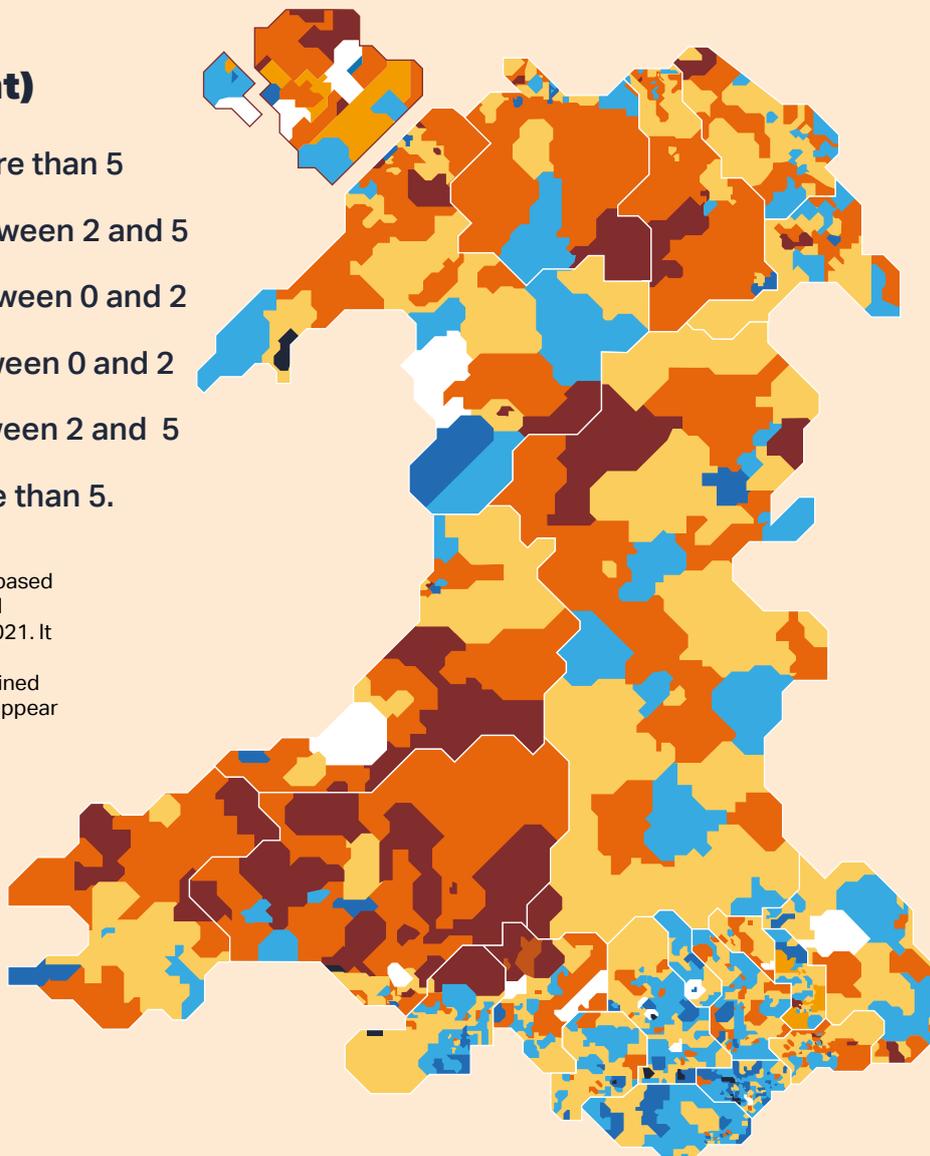


Table 8: Number and percentage of small areas in Wales, by percentage of people aged three years or older able to speak Welsh, 2011–21

Small areas (LSOAs)				
% able to speak Welsh	2011		2021	
	Number	Percentage	Number	Percentage
Less than 25%	1545	80.9	1581	82.5
Between 25 and 39%	113	5.9	105	5.5
Between 40 and 59%	161	8.4	159	8.3
Between 60 and 69%	41	2.1	32	1.7
70% and over	49	2.6	40	2.1
Total	1909	100	1917	100

(Source: Office of National Statistics)

Because the number of small areas has increased since 2011 and the boundaries of some of the areas have changed, it is impossible to make direct comparisons between the two decades, but it is worth examining these small areas in 2011 and 2021 separately to get an idea of the change that has occurred.

70% or more of the population can speak Welsh in 40 small areas in Wales today, which is 2.1% of all small areas across the country. These small areas can only be found in two local authorities: 34 of them in Gwynedd and 6 in Anglesey. That is almost half of the small areas in Gwynedd. In 2011 there were 49 small areas with 70% or more of the population able to speak Welsh: 39 in Gwynedd, 8 in Anglesey, 1 in Conwy and 1 in Carmarthenshire.

Looking at the small areas where 60–69% of the population can speak Welsh, there are 32 such areas today. These are now located in the local authorities of Gwynedd (15), Anglesey (8), Carmarthenshire (5) and Conwy (4). In 2011, areas in this category could be found in seven local authorities: in Carmarthenshire (12), Gwynedd (11), Anglesey (8), Conwy (4), Ceredigion (3), Neath Port Talbot (2), and Pembrokeshire (1).

There are 159 small areas across Wales where 40–59% of the population speak Welsh, with the highest number in Carmarthenshire (53), Ceredigion (37) and Anglesey (20). Almost half of the small areas of Carmarthenshire and Anglesey fall into this category, while over 80% of the small areas of Ceredigion fall into this category. There were 161 small areas in this category in 2011 with 55 in Carmarthenshire, 33 in Ceredigion and 22 in Anglesey. The number of areas remained stable in Pembrokeshire (9), Denbighshire (8), Conwy (8), and Neath Port Talbot (4). There were 15 such small areas in Gwynedd in 2011 while there were 16 small areas in 2021, and there were 7 small areas in Powys in 2011 while there were 4 in 2021.

There are 105 small areas in Wales where 25–39% per cent of the population can speak Welsh. The largest number of these are in Carmarthenshire (32), Conwy (10) and Denbighshire (10). There were 113 of these areas in 2011 with 31 in Carmarthenshire, 13 in Conwy and 12 in Denbighshire. In 2011, there were only 2 small areas in this category in Cardiff and not a single area in Rhondda Cynon Taf, but by 2021 there are 7 areas in this category in Cardiff and 3 in Rhondda Cynon Taf.

This means that **less than 25% of the population speaks Welsh in 83% of the small areas of Wales today**, this corresponds to 1,581 small areas. None of Anglesey's small areas fall into this lower category. There are 2 areas in this category in Gwynedd, and both can be found in parts of the university city of Bangor. In contrast, all small areas in Bridgend, the Vale of Glamorgan, Merthyr Tydfil, Caerphilly, Blaenau Gwent, Torfaen, Monmouthshire, and Newport fall into this category.

5.7 Welsh speakers living outside Wales

The questions about the Welsh language are only included in the Wales version of the census questionnaire, and therefore the census does not tell us much about who can speak Welsh across the border.

However, the questionnaire asks people living in England about their main language. In 2021, **7,349 people in England identified Welsh as their main language (0.01% of the population)** compared with 8,248 in 2011. The question and the data do not reflect the number of people who can speak Welsh but do not consider it to be their 'main language'.



In 2021

7,349

people in England identified
Welsh as their main language

The Commissioner's conclusions



Gwynedd, Anglesey and Ceredigion remain strongholds of the Welsh language, but it is concerning that the populations of these three local authorities have declined while the population of Wales as a whole has grown. As the population decreases in these areas, without serious efforts to create more Welsh speakers from the current population or to create opportunities to attract or retain Welsh speakers in these areas, it is inevitable that the number of Welsh speakers there will decrease again.

The scale of the decline in Carmarthenshire is also a great cause for concern as the population there has grown significantly. That growth has not translated into an increase in the number of speakers, and **a clearer understanding of how the population has grown is needed to identify the interventions needed to reverse the situation there.**

It is striking that there is now a higher number of Welsh speakers in Cardiff than in Anglesey or Ceredigion. There are many more people living in Cardiff, of course, so the percentage of Welsh speakers there remains low. But these high numbers of Welsh speakers cannot be ignored and the **linguistic skills that now exist in the capital must be utilised.**

The fact that there are small areas in Cardiff where there is a higher percentage of Welsh speakers than in many other small areas of Wales also demonstrates the growth of the Welsh language in the capital, and it could be said that the Welsh language is now a natural and prominent part of those small areas despite English still being the majority language.

The huge increase in the number of Welsh speakers in Cardiff over the decades is reflected to a lesser extent in neighbouring local authorities, and **continued efforts will be needed to sustain and build on this progress across the south-east**

It is important not to forget the large numbers of Welsh speakers living in local authorities and specific areas that lie beyond the traditional heartlands of the language. **These speakers have the same rights to use their Welsh as speakers living in areas of higher density.** It is also important to create deliberate opportunities for people to socialise and use their Welsh in those areas where Welsh is not the main community language so that they have opportunities to use the language naturally as part of their lives.

6. Are there other ways of putting Welsh speakers on a map?

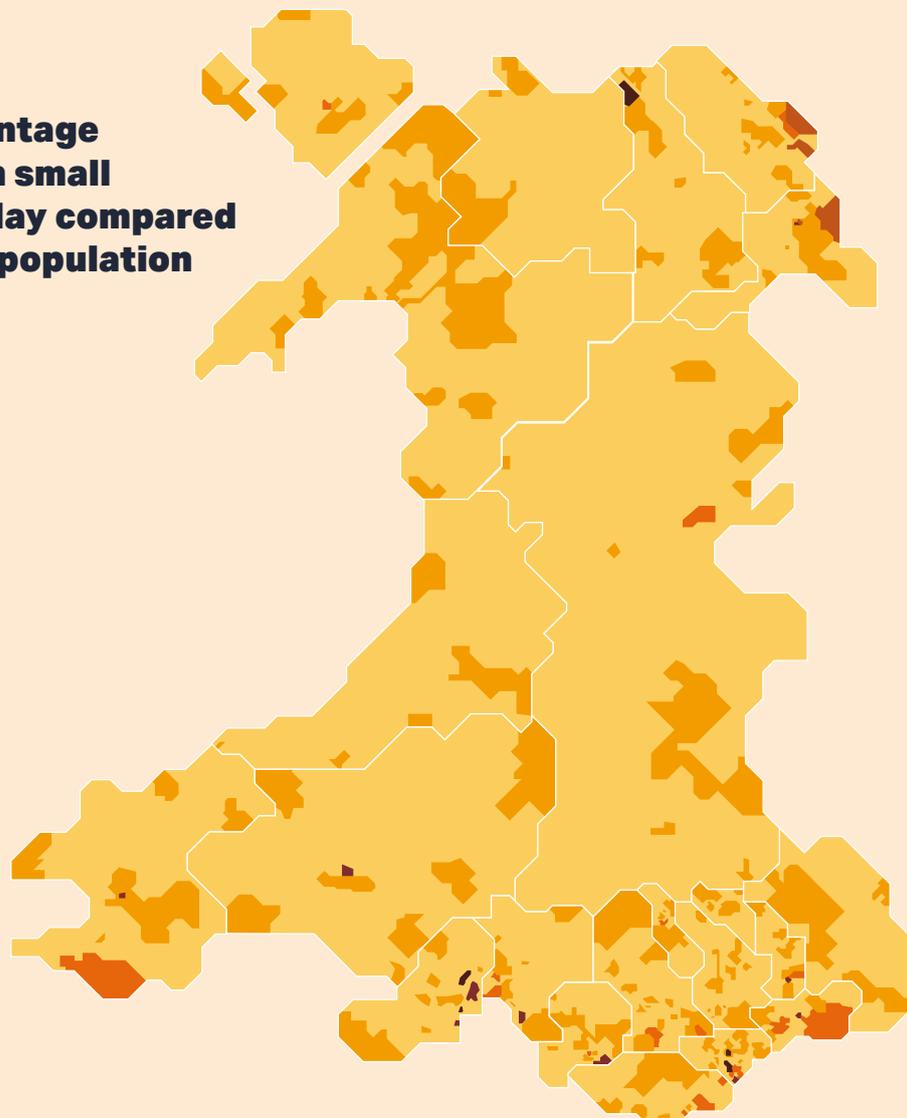
Of course, Welsh speakers do not remain at the address where they filled out the census questionnaire all day every day. And our desire to put Welsh speakers on the map risks creating a misleading picture of a population that is very static.



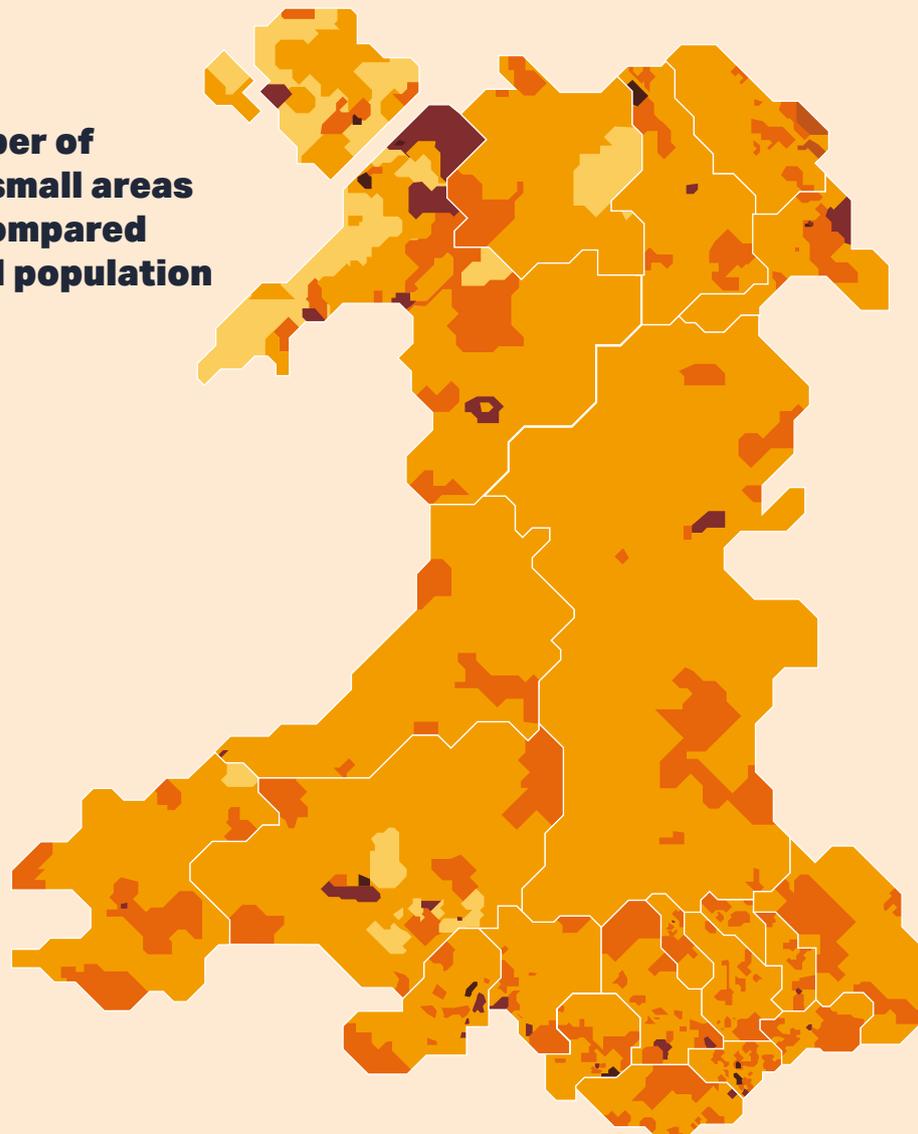
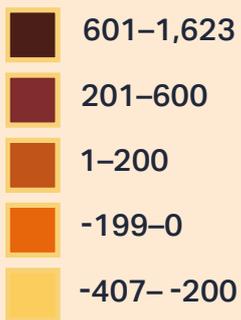
We are a mobile population with economic, social, and educational factors shaping our daily patterns.

Map 6: Maps illustrating the percentage change and change in the number of Welsh speakers in small areas on a working day compared with the residential population

Change in the percentage of Welsh speakers in small areas on a working day compared with the residential population



Change in the number of Welsh speakers in small areas on a working day compared with the residential population



(Source: Office of National Statistics)

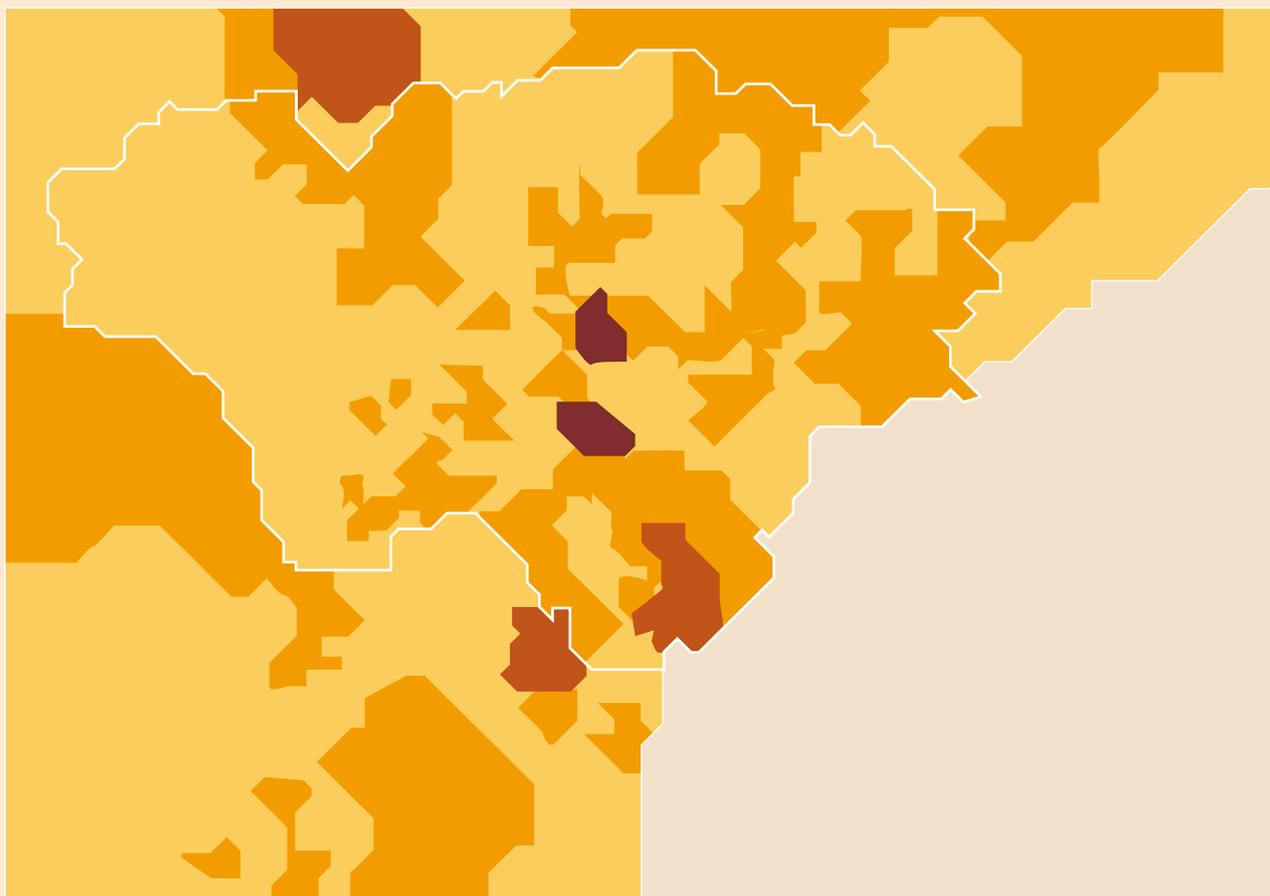
Map 6 is an attempt to illustrate these movement patterns. Both maps compare the location of Welsh speakers during the day with their home – one shows the percentage change and the other shows the change in the numbers of Welsh speakers.⁸ The small areas shaded yellow on both maps are those areas that lose the most Welsh speakers during the day, and the small areas that are shaded brown on the maps are those that receive the most Welsh speakers during the day.

⁸ Thanks to Hywel Jones [Statistics relating to the Welsh language and Wales - and more](#) for his expert advice in developing this part of the report.

Overall, **rural areas tend to lose Welsh speakers during the day, while urban areas tend to receive them.** It must be emphasised, however, that direct links cannot be made between those areas that lose Welsh speakers and those that receive them. That is, it is not possible to trace specific speakers as they commute to work or school, we are simply theorising on the basis of what we know about prominent employers in those areas that receive a high number of Welsh speakers during the working day.

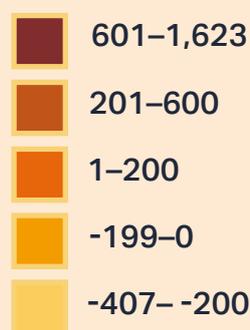
To take a closer look at these patterns here are examples of three very different areas: Cardiff and the surrounding area; Bangor/Caernarfon and the surrounding area; and east Carmarthenshire and Swansea. These maps highlight the change in numbers as they better highlight the commuting patterns to workplaces.

Map 7: Map illustrating the change in the number of Welsh speakers in small areas on a working day compared with the residential population (Cardiff)



(Source: Office of National Statistics)

Change in the number of Welsh speakers in small areas on a working day compared with the residential population: Cardiff

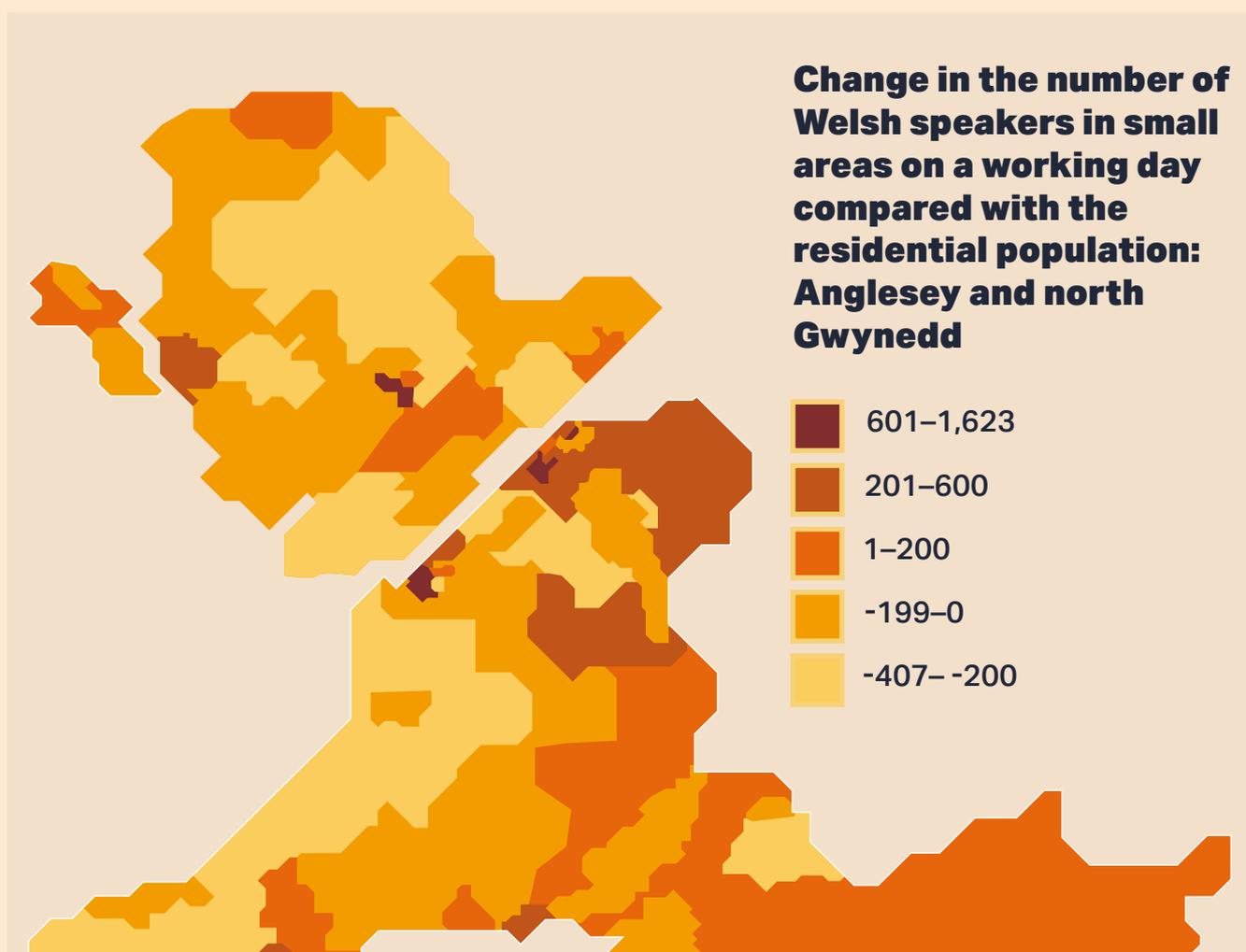


Map 7 of Cardiff and the surrounding area clearly illustrates how areas around Cardiff lose Welsh speakers during the day and other areas receive large numbers of Welsh speakers: **Cardiff Bay and Cathays Park** being prominent examples.

Given the large organisations and prominent employers based in these areas – Welsh Government, Cardiff University and the Senedd, for example – it is very likely that workers commuting to their place of work are responsible for these numbers. **This increase clearly demonstrates the potential for the Welsh language to be used in these specific areas of Cardiff during the working day.**

Very similar patterns can be found in an area where there is a higher density of speakers, as highlighted in Map 8 of north-west Wales. Even an area considered to belong to the traditional heartlands of the Welsh language experiences a daily linguistic shift. It shows that rural areas of the region lose speakers during the day to specific urban areas – **Caernarfon and Bangor in Gwynedd, and Llangefni in Anglesey.**

Map 8: Map illustrating the change in the number of Welsh speakers in small areas on a working day compared with the residential population (Anglesey and north Gwynedd)

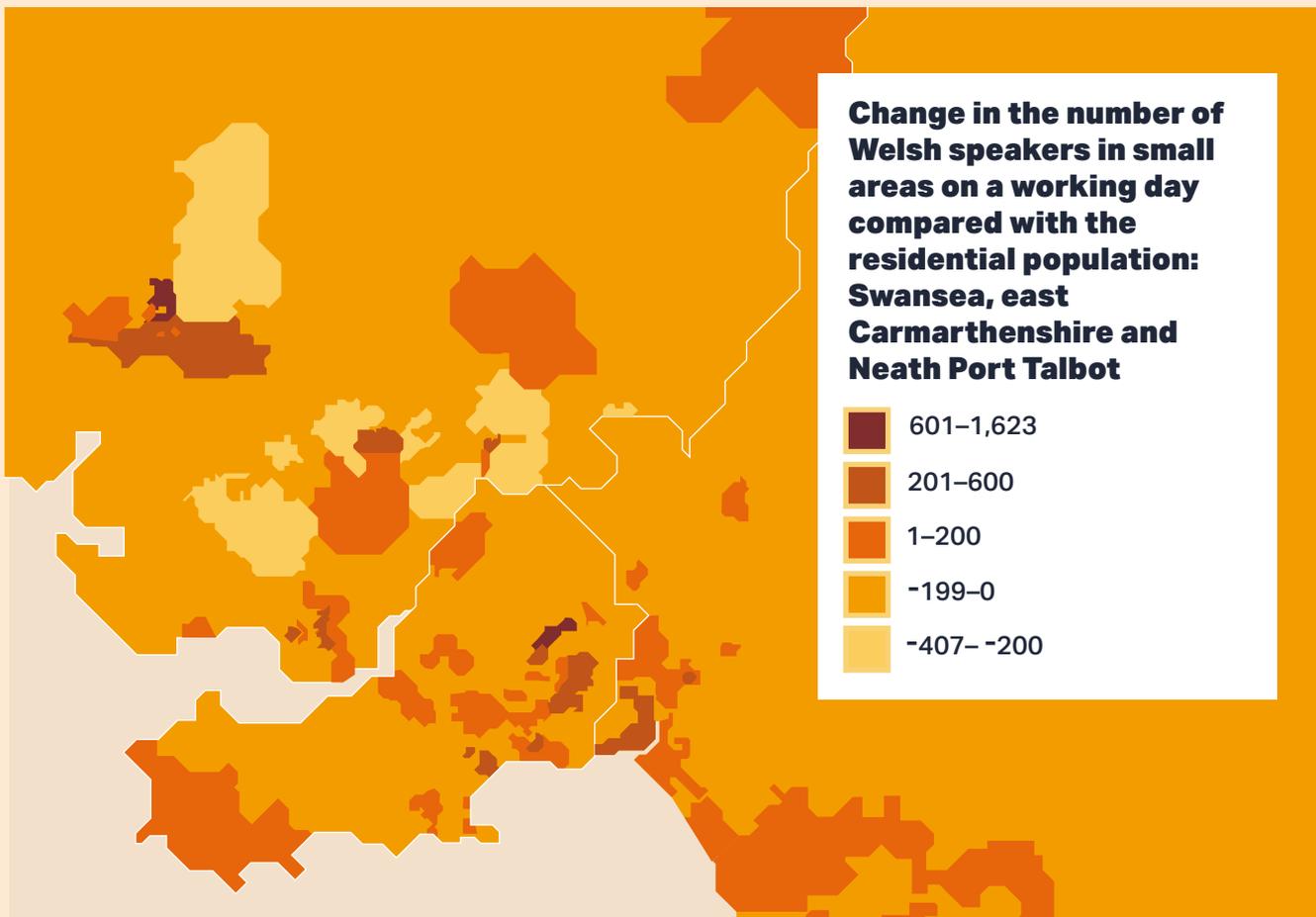


Again, it is likely that commuting patterns explain these changes, as Welsh speakers travel to work for some of the area’s main employers, including Bangor University, Cyngor Gwynedd, Anglesey County Council, and secondary schools.

Map 9 illustrates the daily shifts in the distribution of Welsh speakers in the Neath Port Talbot, Swansea and east Carmarthenshire area. This area was chosen because it covers areas with a high density of speakers – the traditional heartlands of the Welsh language – as well as areas with a much lower density of speakers.

Again, some rural areas in this area lose Welsh speakers during the day while more urban centres attract them – **Carmarthen, Swansea and Port Talbot**. It is particularly striking to note the high numbers of Welsh speakers travelling to Morrison, probably due to prominent employers there such as the hospital and the DVLA.

Map 9: Map illustrating the change in the number of Welsh speakers in small areas on a working day compared with the residential population (Swansea, east Carmarthenshire and Neath Port Talbot)



The Commissioner's conclusions



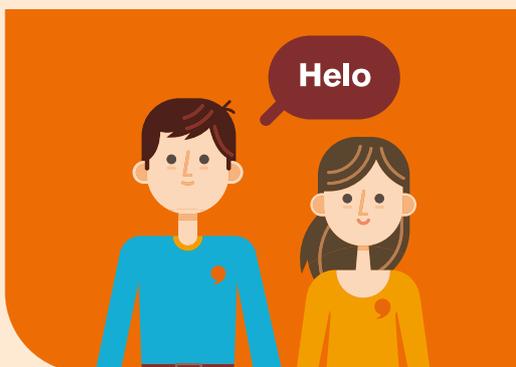
It is important to remember that Welsh speakers move throughout the day for work and leisure and that the fact that Welsh speakers gather in civic or urban centres during the day provides many opportunities for language use.

There is also an opportunity for **workplaces to attract Welsh speakers**, bring speakers together and provide opportunities for Welsh speaking staff to use their language skills.

7. How old are Welsh speakers?

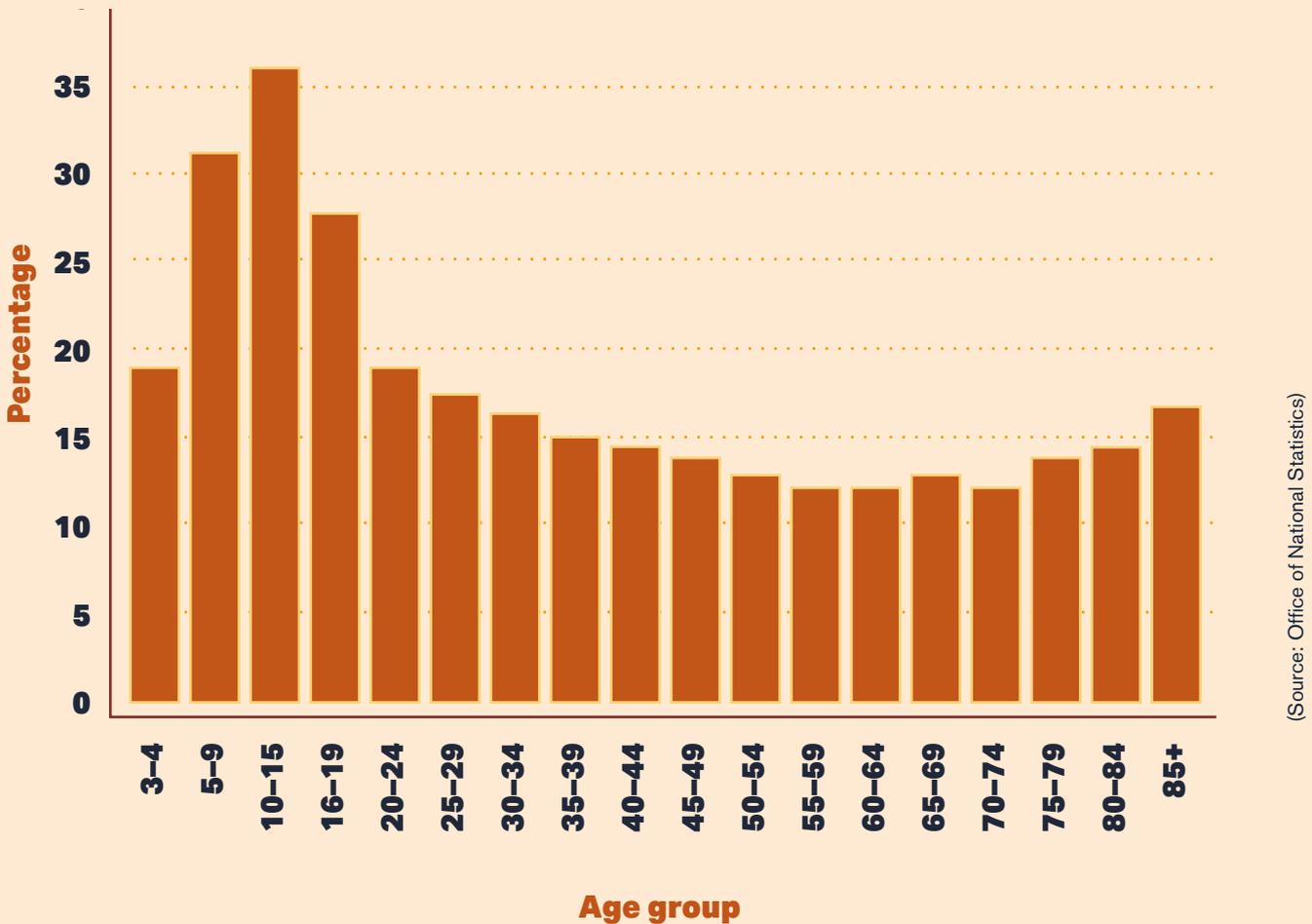
7.1 Percentages and numbers of Welsh speakers by age group

When looking at the population by age categories of roughly five years, the highest percentages and numbers of Welsh speakers are found among children aged 5 to 15. This is the age at which children receive statutory education, of course. 36.6% of those aged 10 to 15 years are able to speak Welsh equating to 79,345 in number, while 31.4% or 55,328 of those aged 5 to 9 years are able to speak the language.



It can therefore be said that around one-third of children aged **5–15** in Wales can speak Welsh

Chart 7: Percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by age group



The age group with the third-highest percentage of speakers is the 16–19 age group where 27.5% are able to speak Welsh. This equates to 38,818 people. The percentage falls to 18.6% among those aged 20 to 24 years, and stabilises somewhat from age 25 onwards.

If we group the remaining categories together meaningfully, 16% of those aged 25 to 44 years speak Welsh. The lowest percentages of speakers are in the older groups; 13% of people in the 45–64 age group and 13.9% of people over 65 can speak Welsh. Despite these lower percentages, these groups cannot be ignored as high numbers of speakers belong to the groups. There are 107,345 in the 45–64 age group and 91,745 speakers over the age of 65.

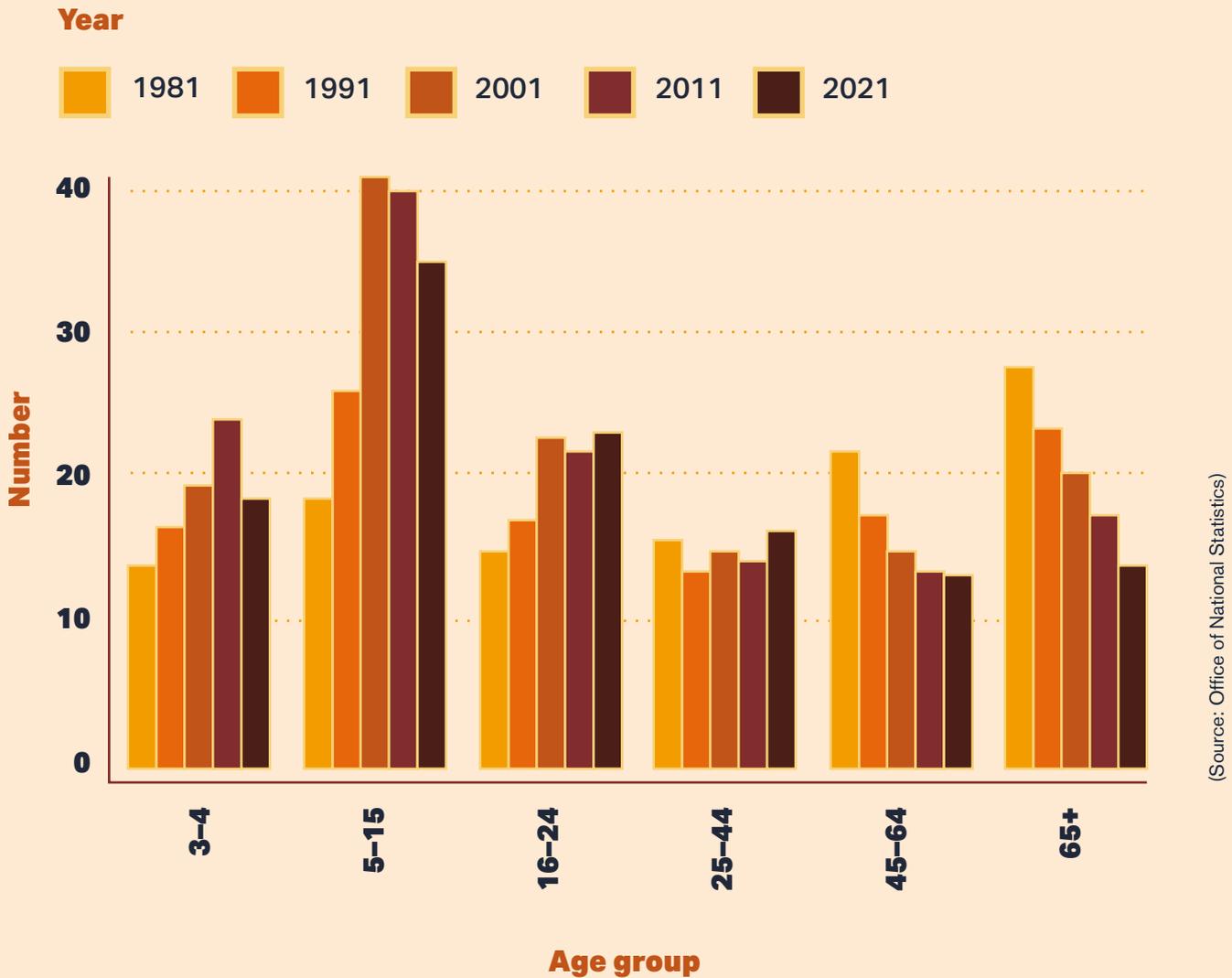
Chart 8: Number of people aged three years or older able to speak Welsh in Wales according to Census 2021, by age group



(Source: Office of National Statistics)

7.2 Comparing 2011 and 2021 results in terms of age group

Chart 9: Percentage of people aged three years or older able to speak Welsh in Wales by age group, 1981–2021



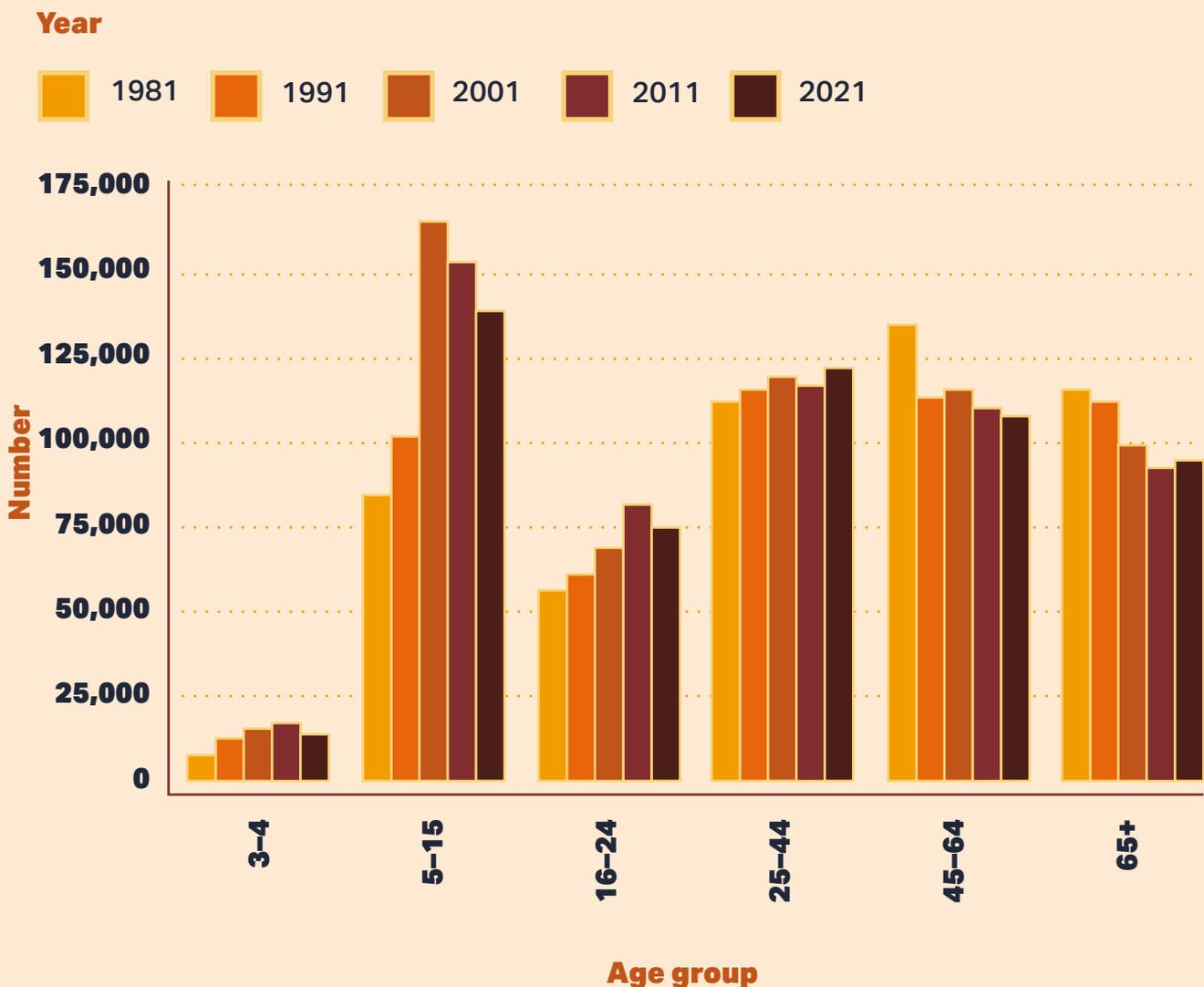
Although the highest percentages of Welsh speakers were found in the 5–15 age group in 2021 as in 2011, this is where the largest decline in the percentage and number of speakers has been seen since 2011. The percentage able to speak Welsh decreased by 6 percentage points over the decade, from 40.3% in 2011 to 34.3% in 2021. That’s 17,582 fewer children able to speak the language in 2021.

The number and percentage of 3- to 4-year-olds able to speak Welsh also decreased during the same period, from 23.3% in 2011 to 18.2% in 2021, a decrease of 5.1 percentage points or 4,548 children. It is worth noting that the number and percentage of children aged 3 to 4 increased over the previous decades and therefore the decrease between 2011 and 2021 was contrary to the pattern of previous years. The number and percentage of 5- to 15-year-olds also increased between 1981 and 2001 before entering a period of decline in subsequent decades.

There was a slight increase of 0.8 percentage points in the percentage of the population aged 16–24 who can speak Welsh, although the number of speakers in this age category decreased. This reflects the decline in the total population aged 16–24 overall. **There was a 1.0 percentage point increase in the percentage of the population aged 25–44 who can speak Welsh**, an increase of 5,364 in number.

The 45–64 and 65+ age groups remained relatively stable. There was a very small percentage decrease of 0.3 percentage points in the 45–64 population who can speak Welsh, which equates to just 596 fewer people able to speak the language in 2021 than in 2011. There was a decrease of 2.3 percentage points in the 65+ population who can speak Welsh, but despite this percentage decline, the number of people in this category increased by 813 people. That reflects the increase in the total population aged 65+ overall.

Chart 10: Number of people aged three years or older able to speak Welsh in Wales by age group, 1981–2021



The percentage of Welsh speakers in these two older age categories has decreased every decade since 1981, but the percentage decline seen between 2011 and 2021 is much smaller than the decline seen in previous decades.

Comparing the results of the number of Welsh speakers in Census 2021 and Census 2011, similar patterns can be seen by age group. The highest numbers of Welsh speakers are still found amongst children and young people in education while the numbers gradually decrease before stabilising in the older age groups.

Table 10: Change in the percentage of people aged three years or older able to speak Welsh in Wales, by age group (percentage point change), 1981–2021

Age group	Percentage point change				1981–2021
	1981–1991	1991–2001	2001–2011	2011–2021	
3–4	2.9	2.6	4.5	-5.1	4.9
5–15	7.6	14.9	-0.5	-6.0	16.0
16–24	2.1	5.1	-0.6	0.8	7.4
25–44	-1.1	0.6	-0.1	1.0	0.4
45–64	-3.3	-1.8	-2.3	-0.3	-7.7
65+	-4.8	-3.1	-3.3	-2.3	-13.5

(Source: Office of National Statistics)

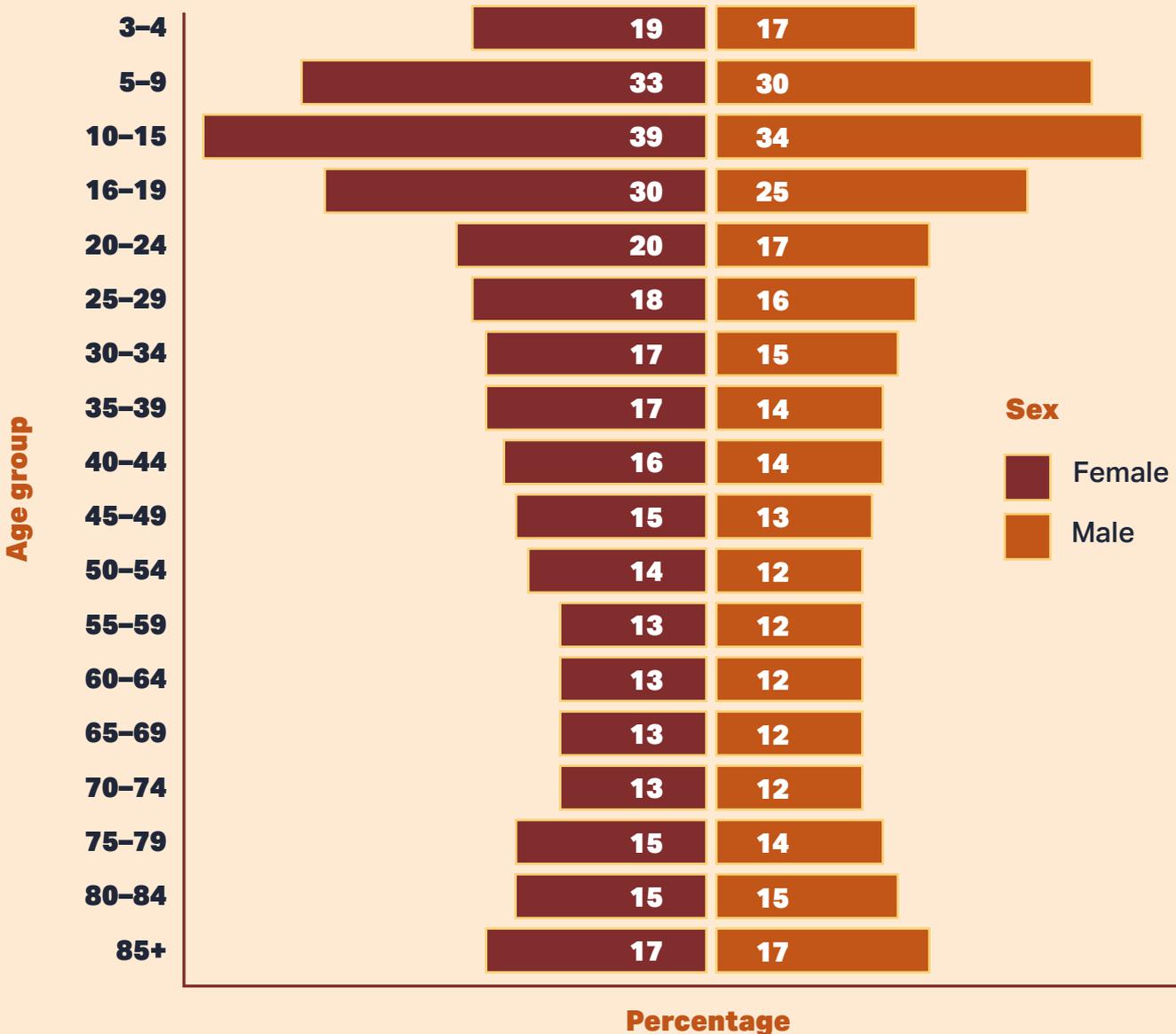
Table 11: Change in the number of people aged three years or older able to speak Welsh in Wales, by age group, 1981–2021

Age group	Person change				1981–2021
	1981–1991	1991–2001	2001–2011	2011–2021	
3–4	3,834	1,079	3,256	-4,548	3,621
5–15	18,363	70,092	-18,913	-17,582	51,960
16–24	4,186	10,521	10,849	-7,171	18,385
25–44	3,465	3,450	-3,231	5,364	9,048
45–64	-20,249	1,577	-4,801	-596	-24,069
65+	-5,033	-12,449	-7,512	813	-24,181

(Source: Office of National Statistics)

7.3 Age and sex of speakers

Chart 11: Percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by age group and sex

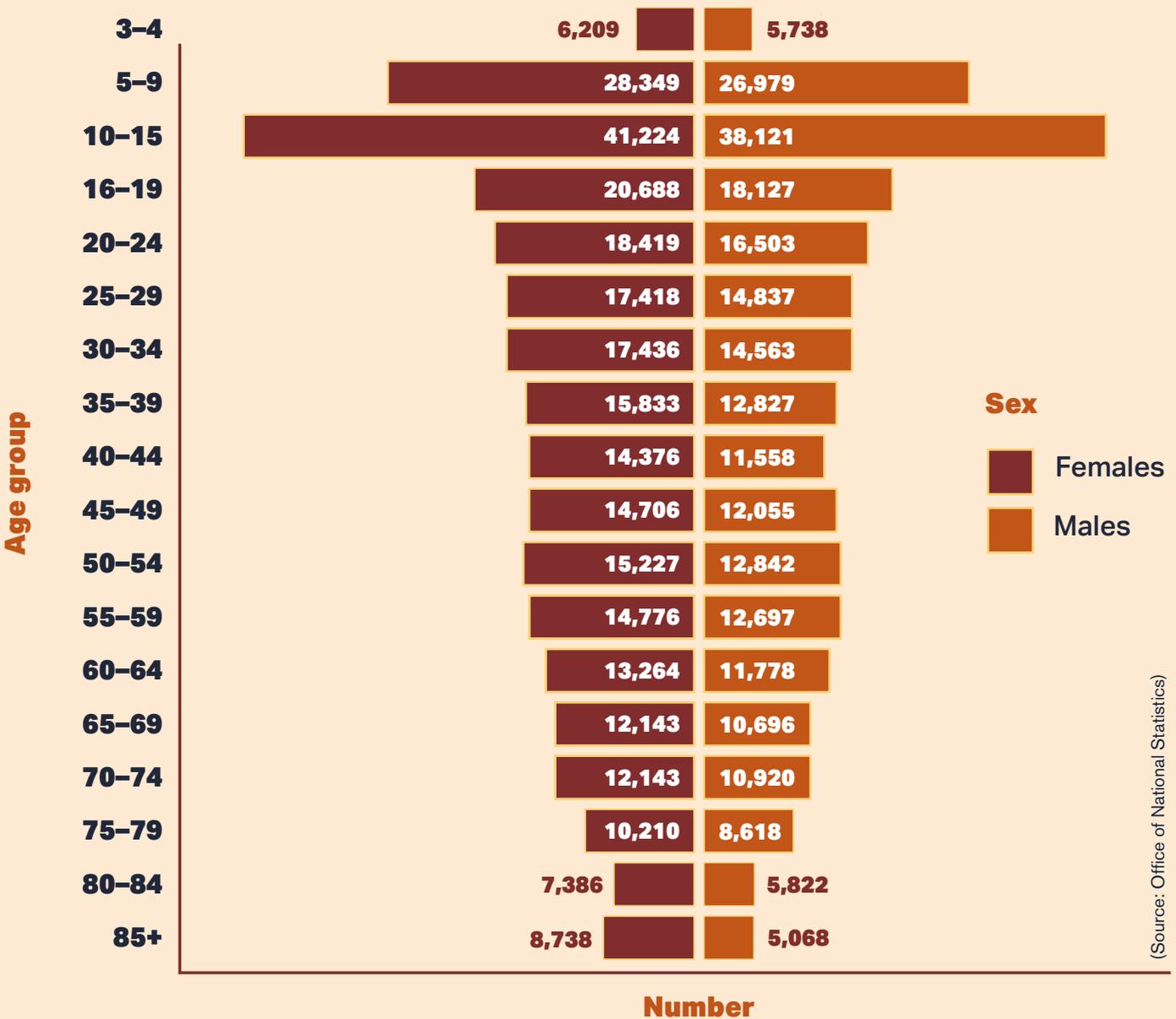


(Source: Office of National Statistics)

The percentage and number of females who can speak Welsh continues to be higher than the percentage and number of males, with 18.7% or 288,546 Welsh females able to speak the language compared with 16.9% or 249,750 males.

This pattern is seen across all age groups. The largest percentage difference is found in the 10–15 and 16–19 age groups where there is around a 5 percentage point difference between the percentages of females and males who can speak Welsh.

Chart 12: Number of people aged three years or older able to speak Welsh in Wales according to Census 2021, by age group and sex



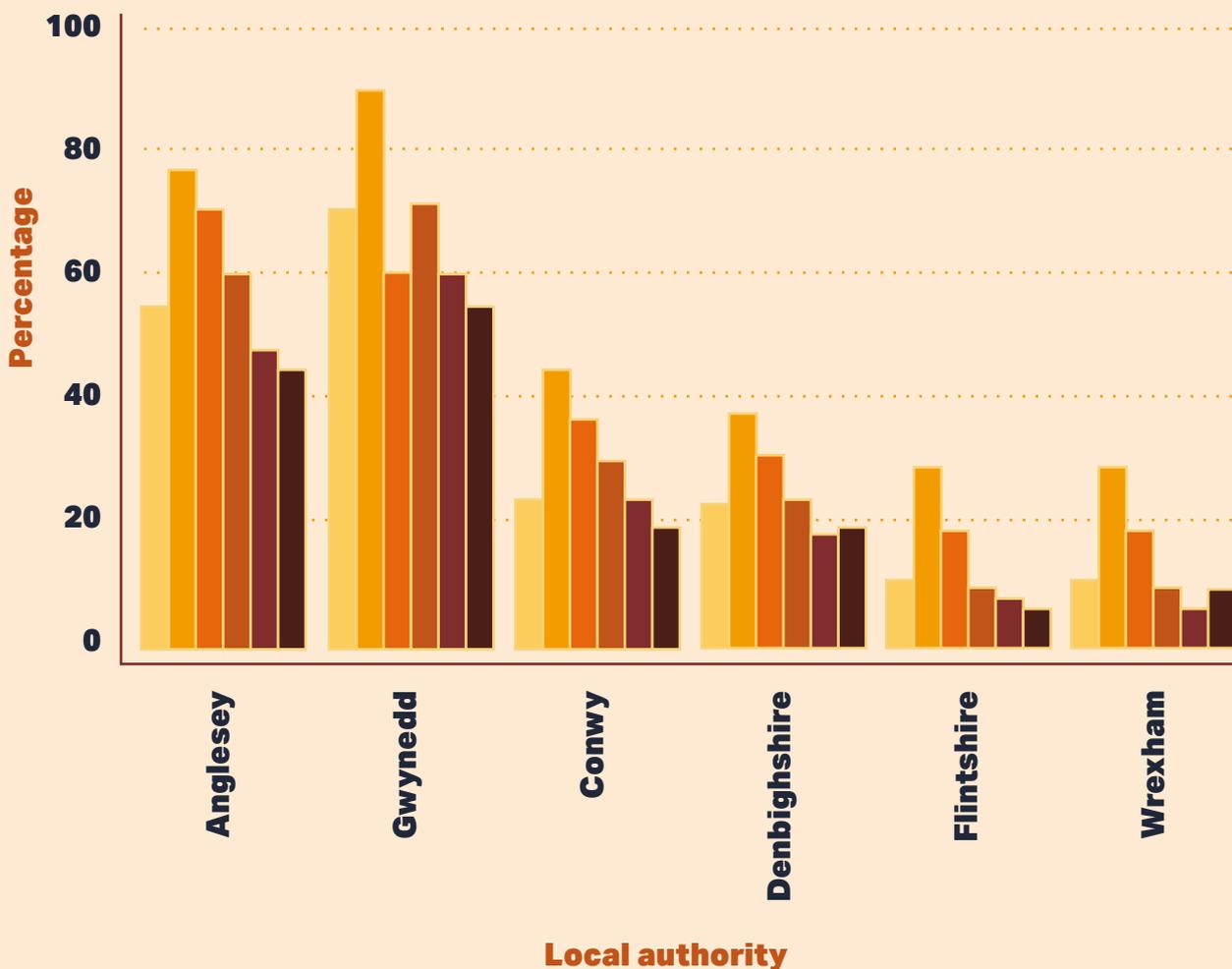
Similarly, a higher number of females than males are able to speak Welsh in all age groups, with the biggest differences in the 85+ age groups where there are 3,670 more females, the 10–15 age group where there are 3,103 more females, and the 35–39 age group where there are 3,006 more females.

7.4 Welsh speakers by age and local authority

It may be useful to look at the percentages of speakers by age according to local authority in order to plan services for Welsh speakers or to plan interventions to increase the number of Welsh speakers in different areas.

Chart 13: Percentage of people aged three years or older who can speak Welsh according to Census 2021, by local authority and age group in north Wales local authorities

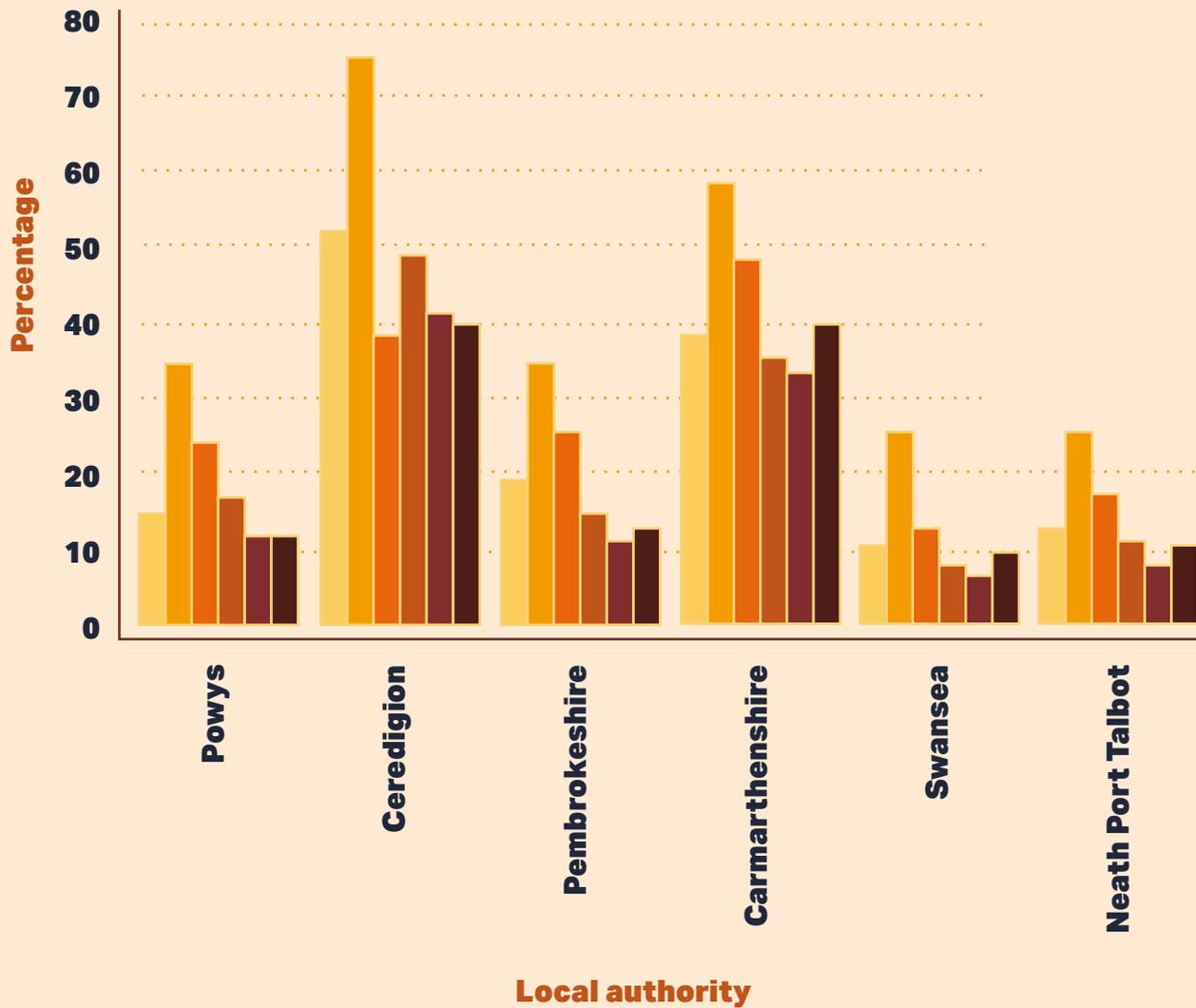
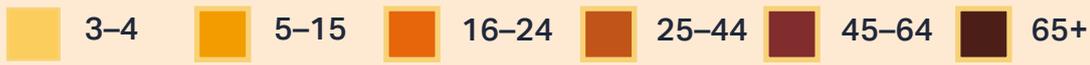
Age group



(Source: Office of National Statistics)

Chart 14: Percentage of people aged three years or older who can speak Welsh according to Census 2021, by local authority and age group in south-west and mid Wales local authorities

Age group



(Source: Office of National Statistics)

Chart 15: Percentage of people aged three years or older able to speak Welsh according to Census 2021, by local authority and age group in central south Wales local authorities

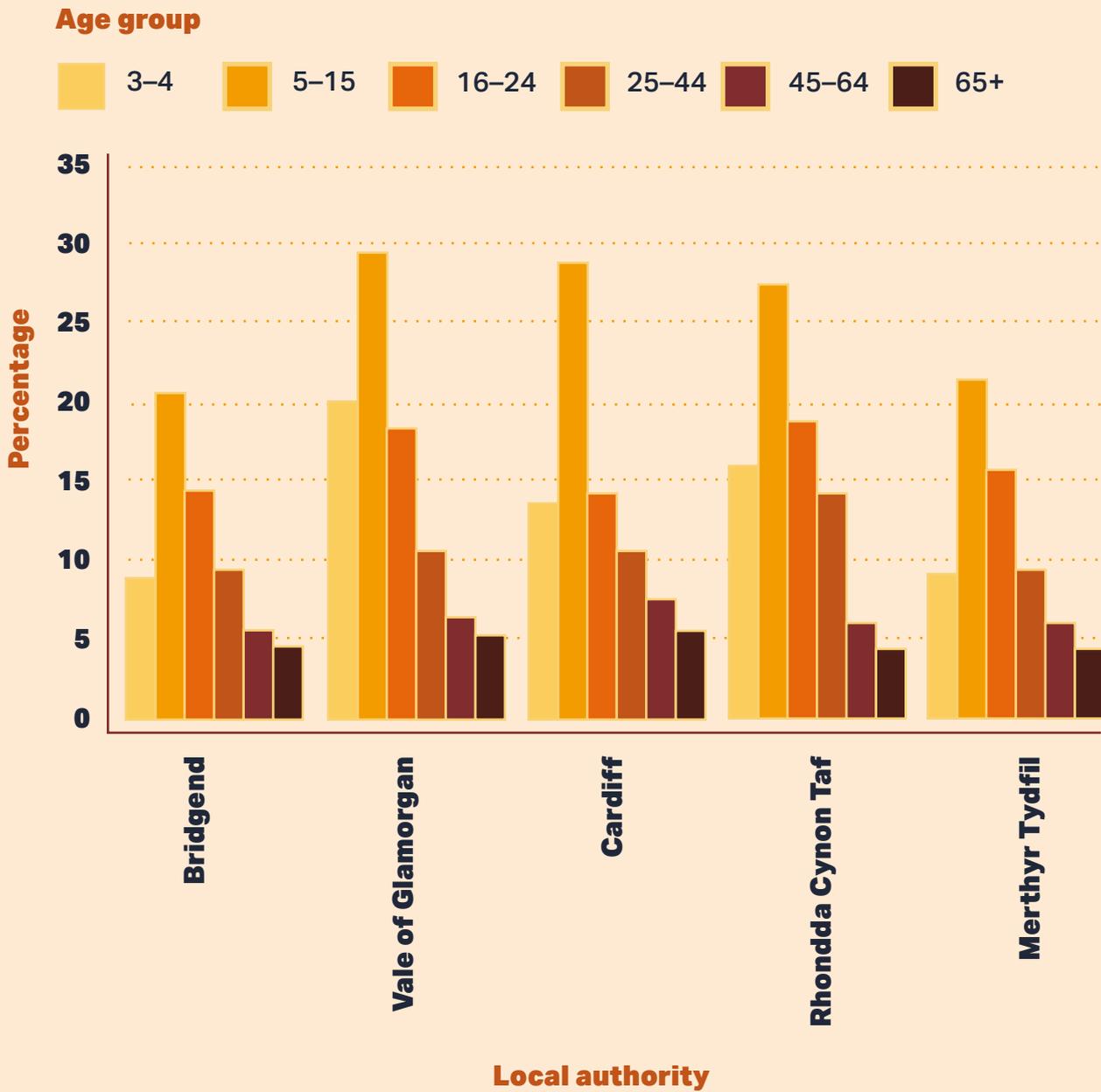
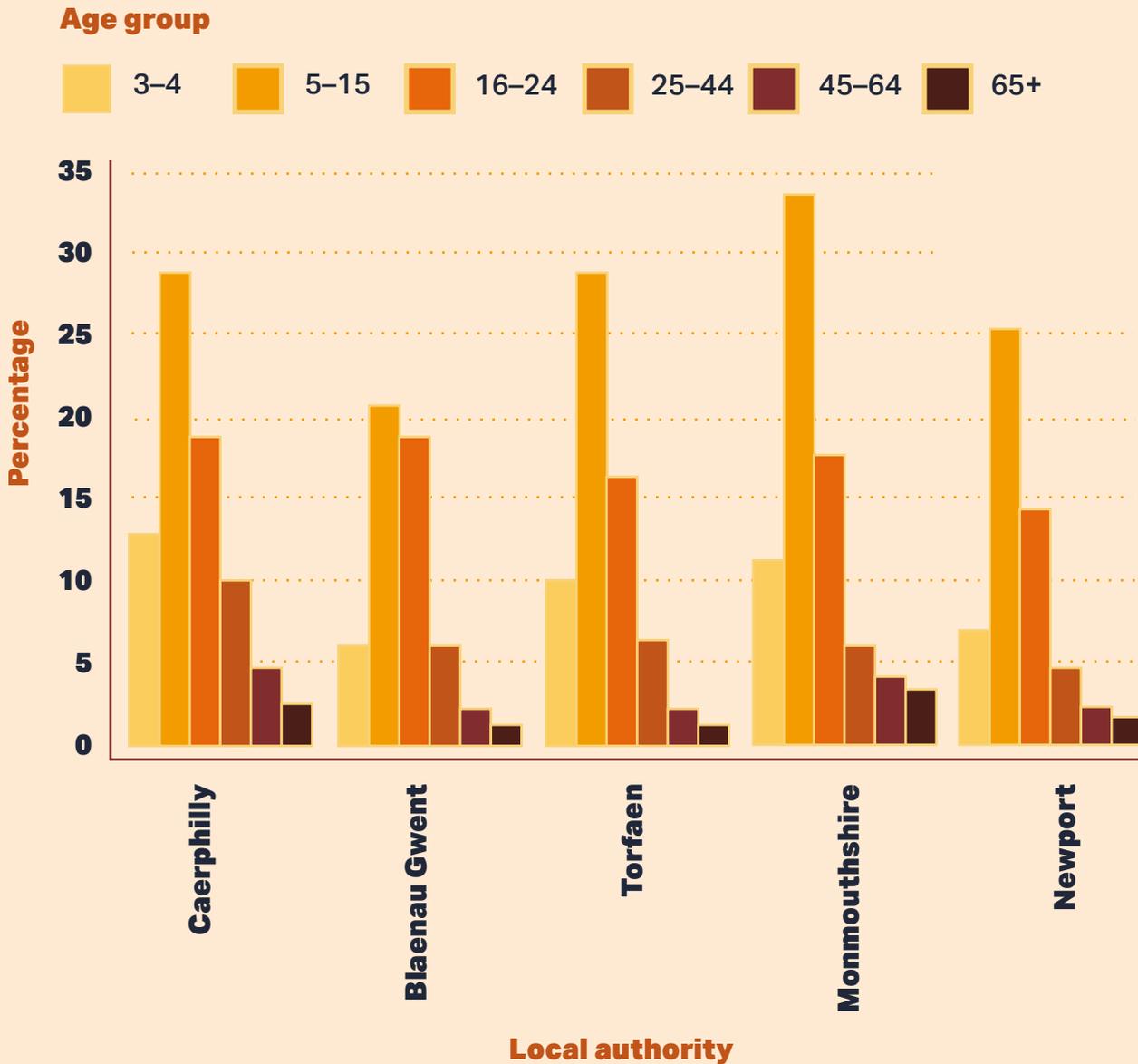


Chart 16: Percentage of people aged three years or older able to speak Welsh according to Census 2021, by local authority and age group in south-east Wales local authorities



(Source: Office of National Statistics)

The highest percentages of Welsh speakers belong to the children and young people's age groups in all local authorities. It is striking that **88.6% of those aged 5 to 15 years in Gwynedd can speak Welsh**, while 20.4% of children of the same age can speak Welsh in Bridgend and also in Blaenau Gwent.

It is not surprising that the percentages of children who can speak Welsh are also high in Anglesey and Ceredigion, with around three quarters of the population aged 5 to 15 able to speak the language.

The lowest percentages of children and young people able to speak Welsh are in the local authorities of south-east Wales, with the percentage of 5- to 15-year-olds below 30% in all of the area's local authorities (excluding Monmouthshire), as well as in Swansea, Neath Port Talbot, Flintshire and Wrexham. The percentage of Welsh speakers in the 5–15 age group declined in all local authorities since 2011. The largest decrease of 13.6% was in Blaenau Gwent, and in Newport where it fell by 13.4%.

Looking at the low percentages of 5- to 15-year-olds in the local authorities of south-east Wales, it is interesting to note the higher percentage in Monmouthshire where 33.1% of those aged 5 to 15 are able to speak Welsh.

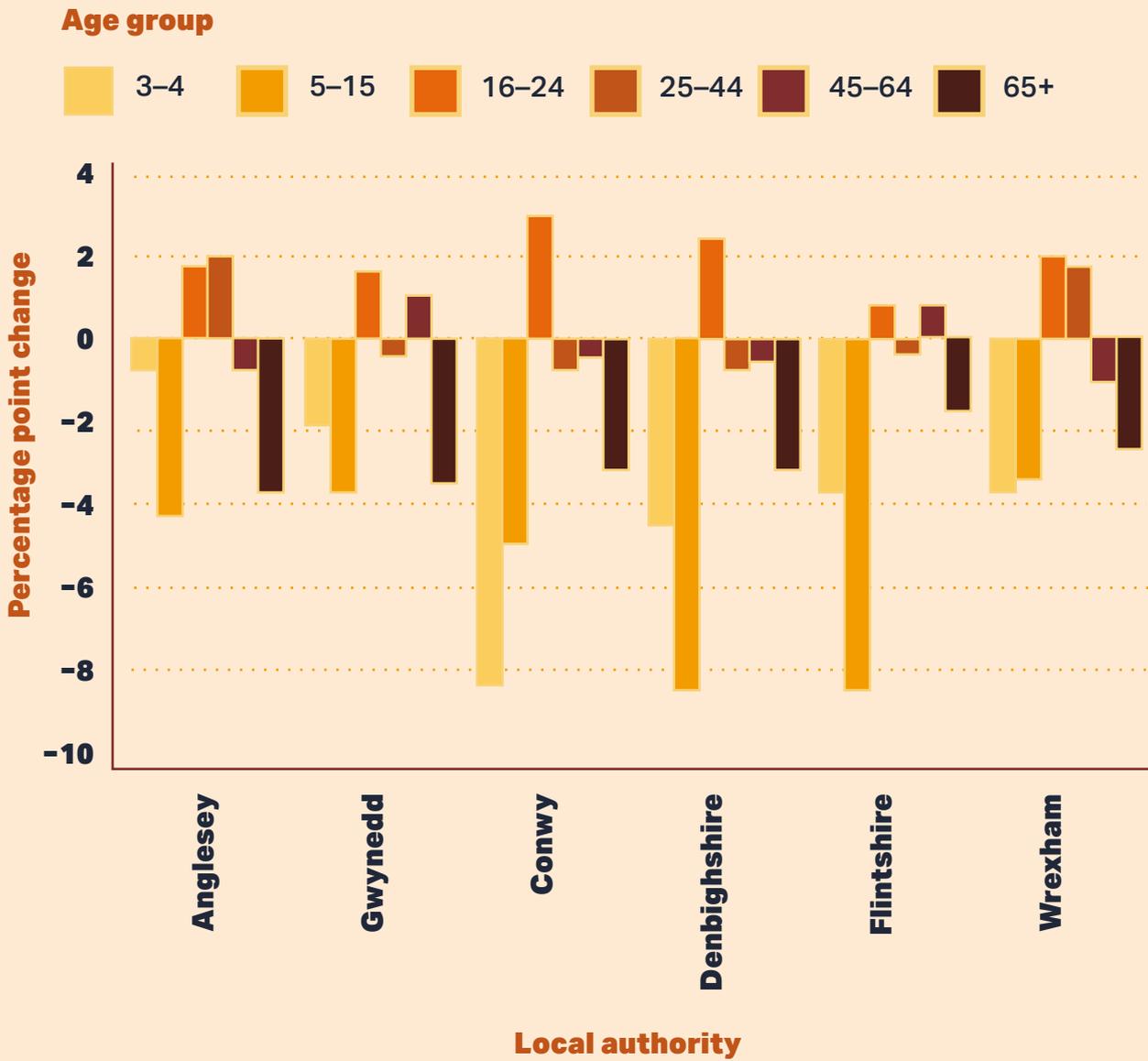
It is also interesting to compare Monmouthshire with the local authorities on the border in north Wales. A higher percentage of children and young people aged 5 to 15 can speak Welsh in Monmouthshire than in Flintshire or Wrexham.

It has already been noted that there has been an increase of 1.0 percentage point in Welsh speakers aged 25 to 44 at a national level, and there has been a percentage increase in Welsh speakers in this age group in 17 of the 22 local authorities since 2011. The largest increase of 3.2 percentage points was seen in Rhondda Cynon Taf and 2.7 percentage points in the Vale of Glamorgan. **The highest numbers of Welsh speakers aged 25 to 44 are found in Gwynedd, Carmarthenshire and Cardiff.**

Turning to speakers over the age of 65, this age group records some of the lowest percentages of Welsh speakers are found in most local authorities. A fairly similar percentage decrease was seen in Gwynedd (3.3 percentage points) and Anglesey (3.7 percentage points) while the decrease was slightly greater in Ceredigion (6.5 percentage points) and Carmarthenshire (8.7 percentage points).

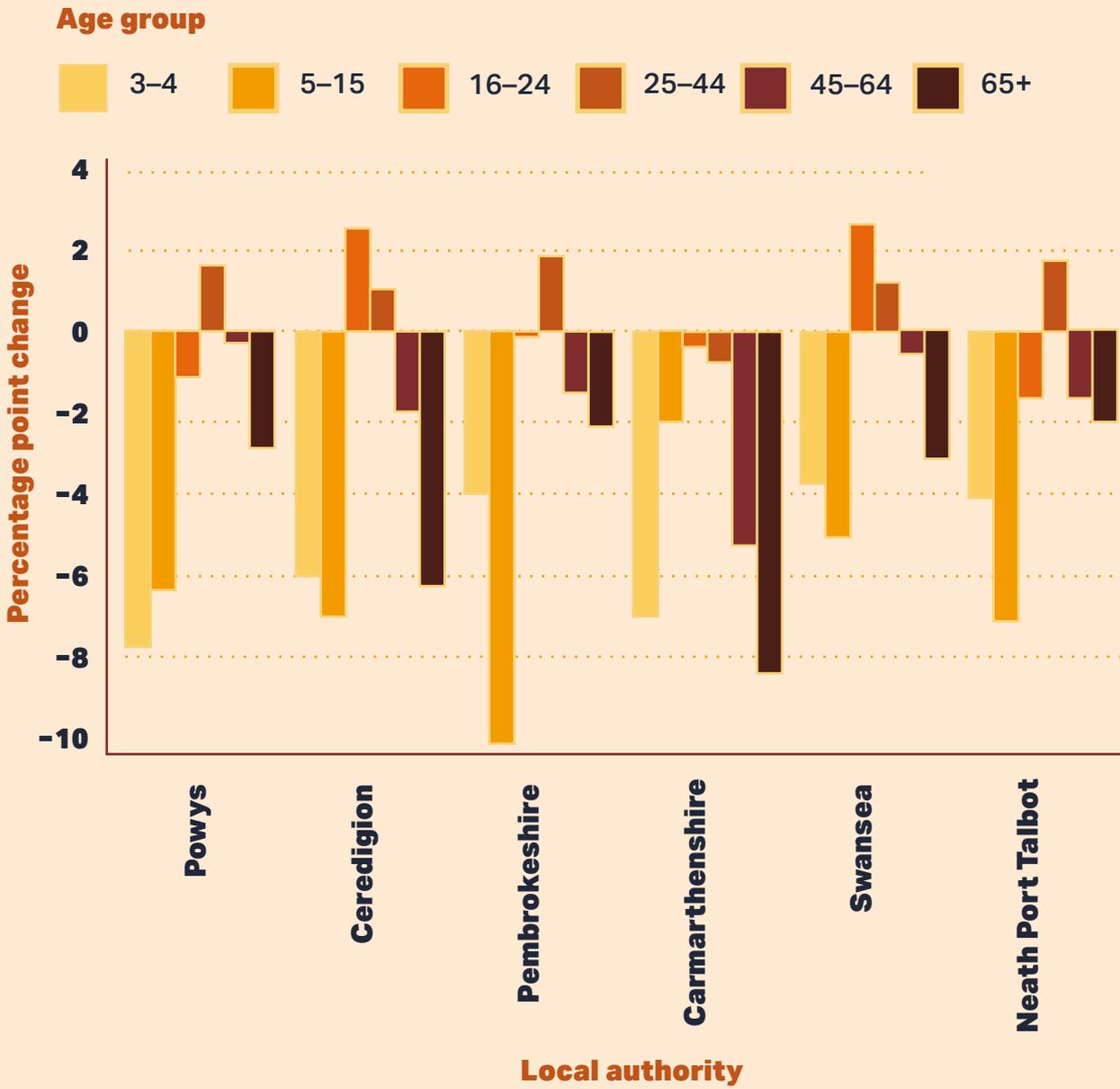
In Gwynedd, 54.7% of the population over the age of 65 can speak Welsh, while fewer than 2% of people in the same age group can speak Welsh in Blaenau Gwent, Torfaen and Newport.

Chart 17: Change in the percentage of people aged three years or older able to speak Welsh according to Census 2021, by local authority in north Wales local authorities (percentage point change), 2011–21



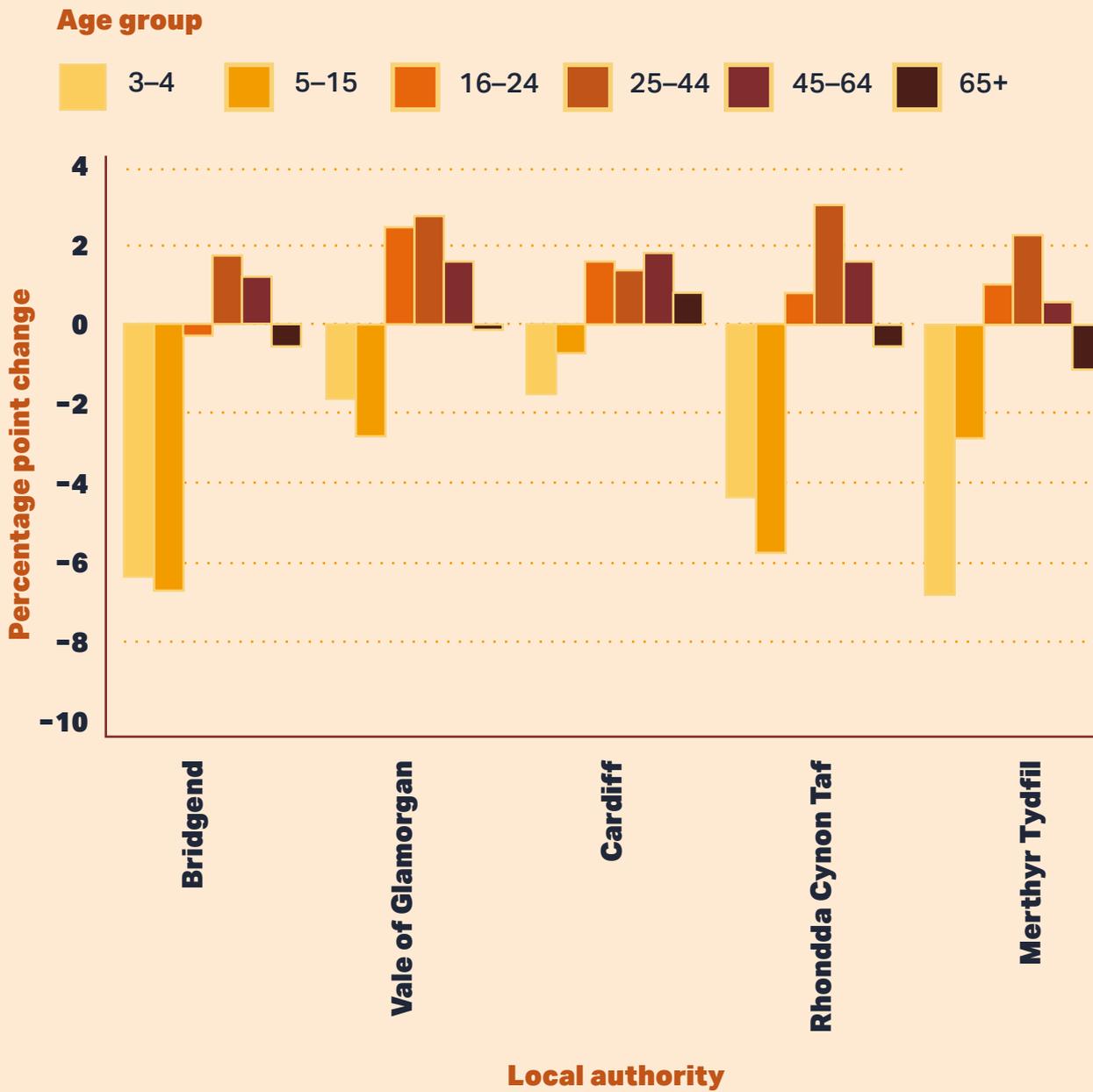
(Source: Office of National Statistics)

Chart 18: Change in the percentage of people aged three years or older able to speak Welsh according to Census 2021, by age group in south-west and mid Wales local authorities (percentage point change), 2011–21



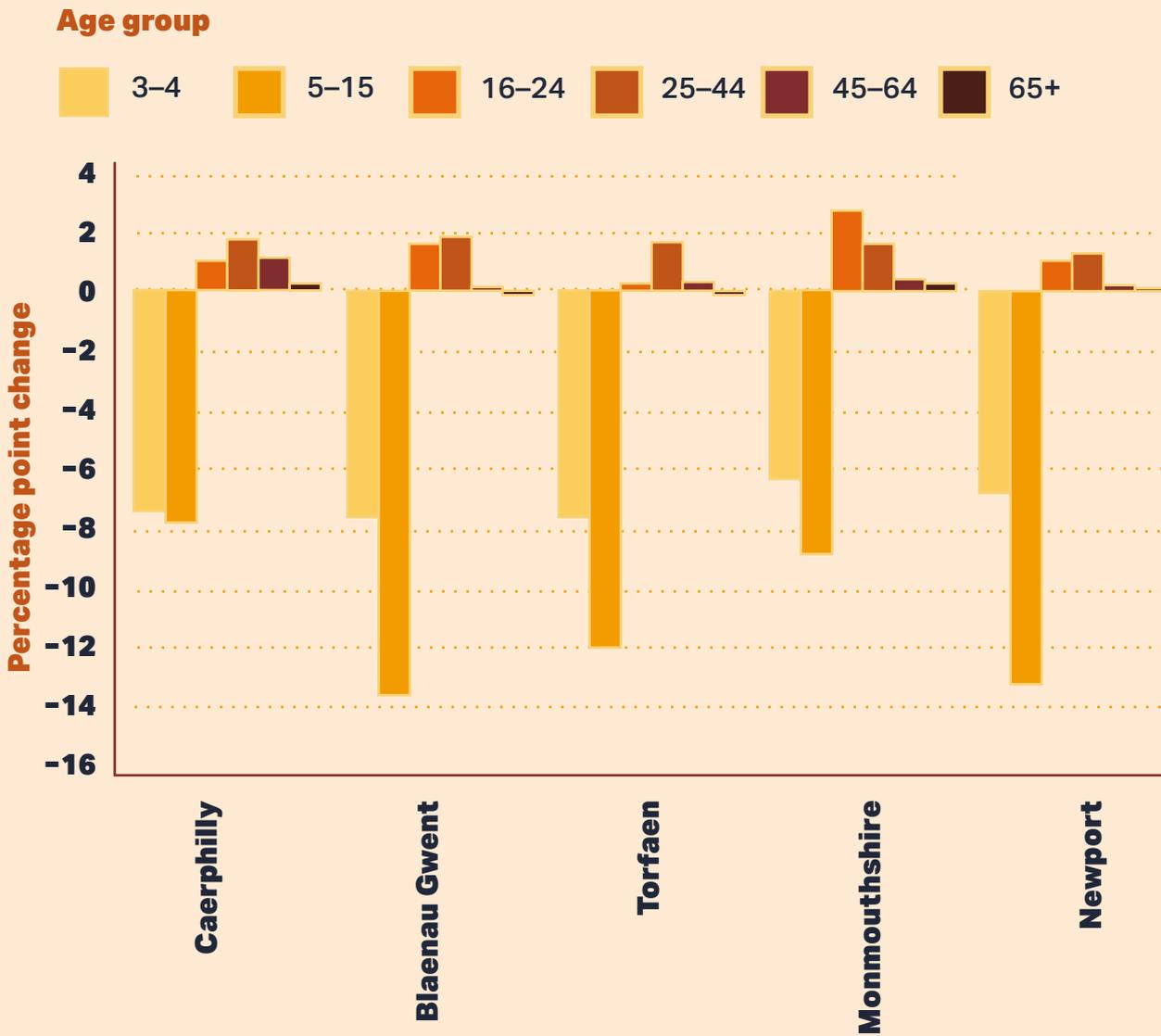
(Source: Office of National Statistics)

Chart 19: Change in the percentage of people aged three years or older able to speak Welsh according to Census 2021, by age group in central south Wales local authorities (percentage point change), 2011–21



(Source: Office of National Statistics)

Chart 20: Change in the percentage of people aged three years or older able to speak Welsh by age group in south-east Wales local authorities (percentage point change), 2011–21



7.5 Spotlight on older speakers

The results of the **2021 Census showed us that Wales has an ageing population**; more older people and fewer children and young people live in the country since 2011. In 2011, 18.4% of people in Wales were over the age of 65, by 2021 the percentage increased to 21.3% meaning that **one in five people in Wales are now over the age of 65**. The percentage of people aged 65+ increased by 20% or more in eight Welsh local authorities.

Although there has been a slight increase in the *number* of Welsh speakers aged 65 and over since 2011, this corresponds to a percentage decline, as the overall population in this age group has risen.

The percentage of Welsh speakers aged 65+ is highest in Gwynedd, Anglesey and Carmarthenshire respectively, whilst the highest numbers are found in Carmarthenshire, Gwynedd and Anglesey, also respectively.

The Commissioner's conclusions



It is natural that a higher proportion of children and young people speak Welsh than any other age group, given that many of them learn Welsh at school. **The challenge is to retain the language skills of these children and young people once they leave the education system** so that they continue to be confident Welsh speakers as they get older.

The significant decline in the percentage of those aged 5 to 15 years who can speak Welsh, however, is a cause for concern, but it is difficult to know to what extent the timing of the census in the midst of the COVID-19 pandemic contributed to the decline. It is also worth bearing in mind that data from the education sector suggests a more stable picture, as discussed in Part 2. Close monitoring of this age group will be essential as the Welsh Language and Education (Wales) Act 2025 is implemented over the coming years.

Although the national percentage of children aged 5 to 15 able to speak Welsh has fallen since 2011, the situation varies greatly from local authority to local authority. The percentages are very high in Gwynedd, Anglesey and Ceredigion and **it is vital that the language skills of the children and young people in these areas are retained and used as they grow older.**

Retaining the Welsh language skills of children and young people is equally important across all other local authorities, but there needs to be a **greater emphasis in these areas on creating more Welsh speakers aged 5 to 15.**

The increase in the percentage of Welsh speakers aged 25 to 44 since 2011 is something to celebrate as this is the age at which people are typically in work and raising families. This increase means that more **Welsh speakers are available to enter roles where Welsh-language skills are required.**

Although the 65+ age group has the lowest percentage of speakers, it is important to remember the high numbers of Welsh speakers aged 65 or over, especially as the population of Wales continues to age. While the situation varies from local authority to local authority, it is important to ensure that there are opportunities for older people to retain and use their Welsh skills as they could be contributing to their grandchildren's language journey, for example.

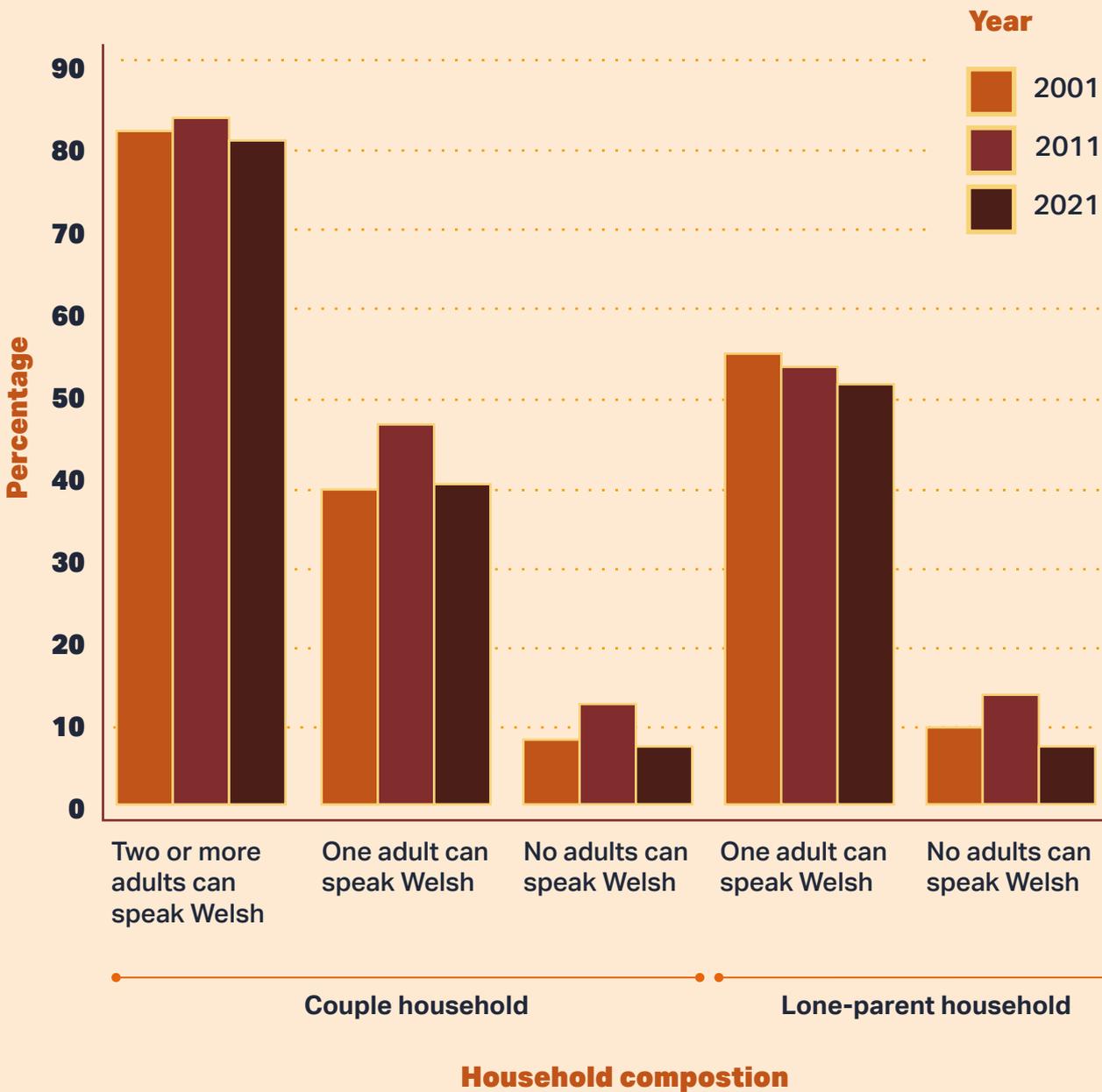
It is also important to consider the need for health and care services in Welsh when thinking about older Welsh speakers and the fact that the older population is growing.

This section provides a relatively high-level, factual overview of the statistic, and **it may be beneficial for local authorities, and others, to analyse the situation in further detail to fully understand the census results.** This is particularly relevant in the context of the percentage of children who can speak Welsh considered alongside the language medium of the local authority's schools and their policies in relation to Welsh and education.

8. Who passes on the Welsh language to their children?

It is possible to get an idea of the transmission rates of Welsh at home by looking at how many children aged 3 to 4 are able to speak Welsh, before the children start receiving statutory education.⁹

Chart 21: Percentage of children aged 3 to 4 in single-family households who can speak Welsh in Wales, by household composition, 2001–21



(Source: Office of National Statistics)

⁹ It should be stressed that this is not the only method that could be used to understand the rate of language transmission and there are some questions about how reliable it is, especially as there are limitations on the linguistic ability of 3- to 4-year-olds in general, and this was intensified during the pandemic. The fact that an adult in the home indicates that their 3- to 4-year-old child speaks Welsh when completing the questionnaire may be an indication of their intention in relation to their children’s language ability. The fact that 7.2% of 3- to 4-year-olds – who live in lone-parent households where no adult speaks Welsh – can speak the language, and 7.3% of 3- to 4-year-olds – who live in couple households where no adult speaks Welsh – can speak Welsh also raises questions about the methodology.

Not surprisingly, couple households where two adults can speak Welsh have the highest proportion of 3- to 4-year-olds who can speak Welsh. **80.7% of children aged 3 to 4, living in couple households where two or more adults can speak Welsh, can speak the language.** This is the ‘Welsh transmission rate’ and has only seen a slight decrease since 2011 when it was 82.2%. The transmission rate of over 80% is very stable since 2001 with a decrease of 1.1 percentage points over this period.

It is also not surprising that lone-parent households where one adult can speak Welsh have the second-highest transmission rate. The percentage is over 50% since 2001 but the rate has fallen by 2.9 percentage points to 52.2% by 2021. This is the largest decrease across the different types of households discussed here in this period.¹⁰

The transmission rate in couple households where one adult can speak Welsh is 40.4%. There was an increase in transmission by 5.6 percentage points between 2001 and 2011, followed by an equivalent decrease between 2011 and 2021.

As expected, the rate is lowest in couple households where the adults are unable to speak Welsh and lone-parent households where no adults are able to speak Welsh. It is not possible for the Welsh language to be ‘transmitted’ from generation to generation in the household in these scenarios, of course. However, the rate is 7.3% in couple households and 7.2% in lone-parent households where there are no adults who can speak Welsh, possibly reflecting social factors outside the home.

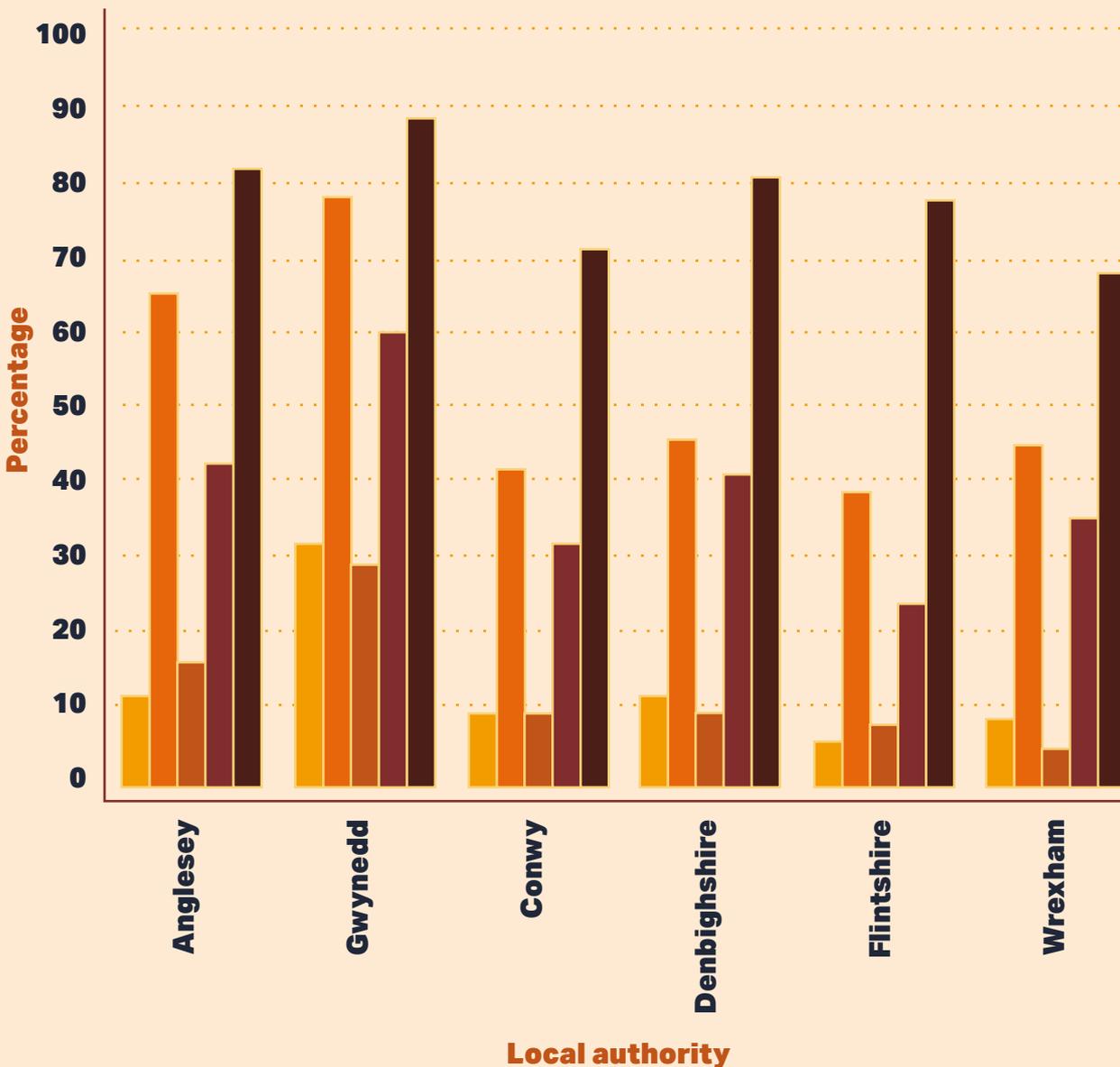
¹⁰ This analysis focuses on couple households where two adults speak Welsh and where one adult speaks Welsh, and lone-parent households where one adult speaks Welsh. The analysis does not take into account lone-parent households where two adults speak Welsh.

8.1 Transmission rate by local authority

Chart 22: Percentage of children aged 3 to 4 in single-family households who can speak Welsh in north Wales local authorities according to Census 2021, by household composition

Household composition

- Lone-parent household: no adults can speak Welsh
- Lone-parent household: one adult can speak Welsh
- Couple household: no adults can speak Welsh
- Couple household: one adult can speak Welsh
- Couple household: two or more adults can speak Welsh

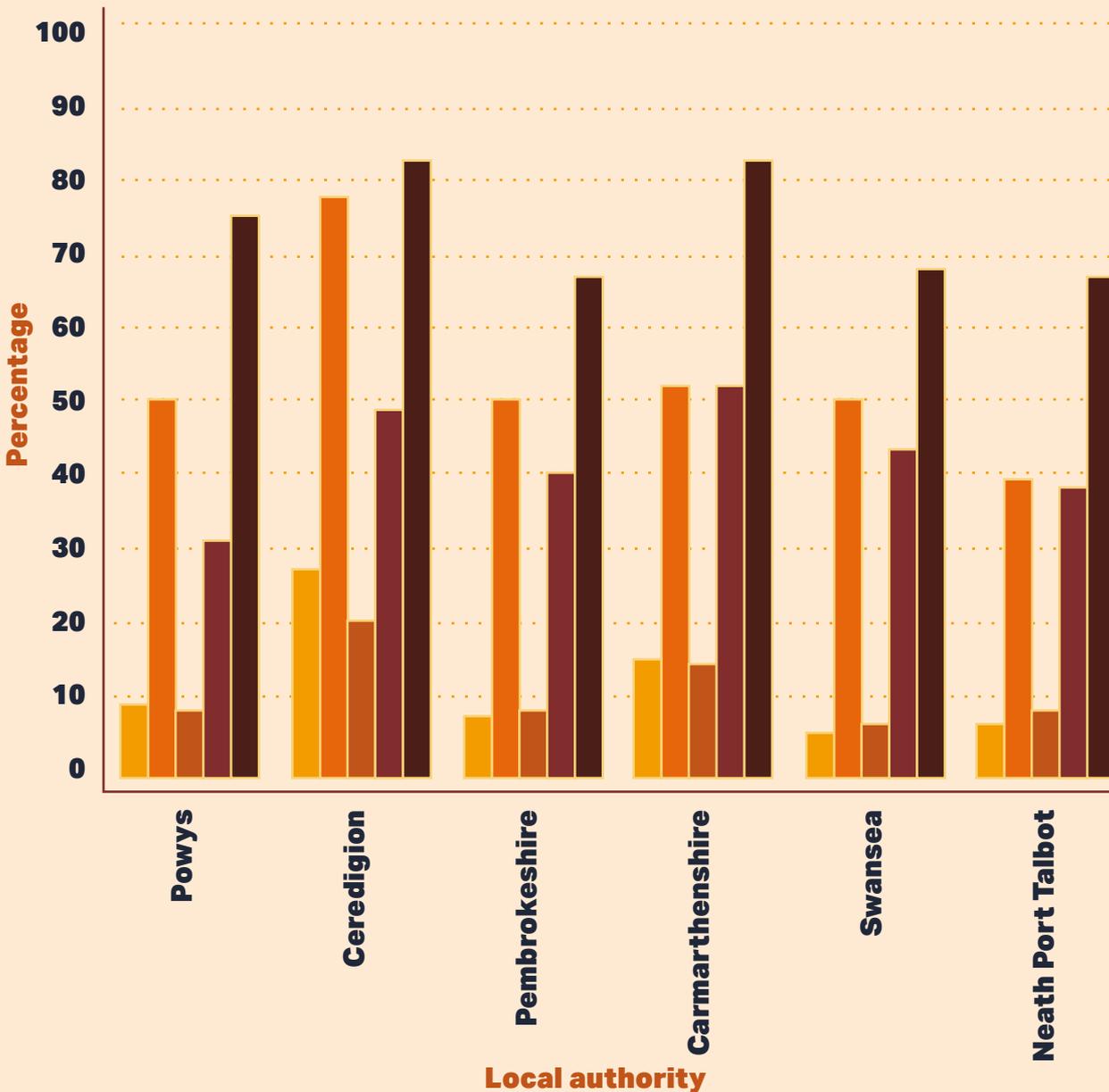


(Source: Office of National Statistics)

Chart 23: Percentage of children aged 3 to 4 in single-family households who can speak Welsh in south-west and mid Wales local authorities according to Census 2021, by household composition

Household composition

- Lone-parent household: no adults can speak Welsh
- Lone-parent household: one adult can speak Welsh
- Couple household: no adults can speak Welsh
- Couple household: one adult can speak Welsh
- Couple household: two or more adults can speak Welsh

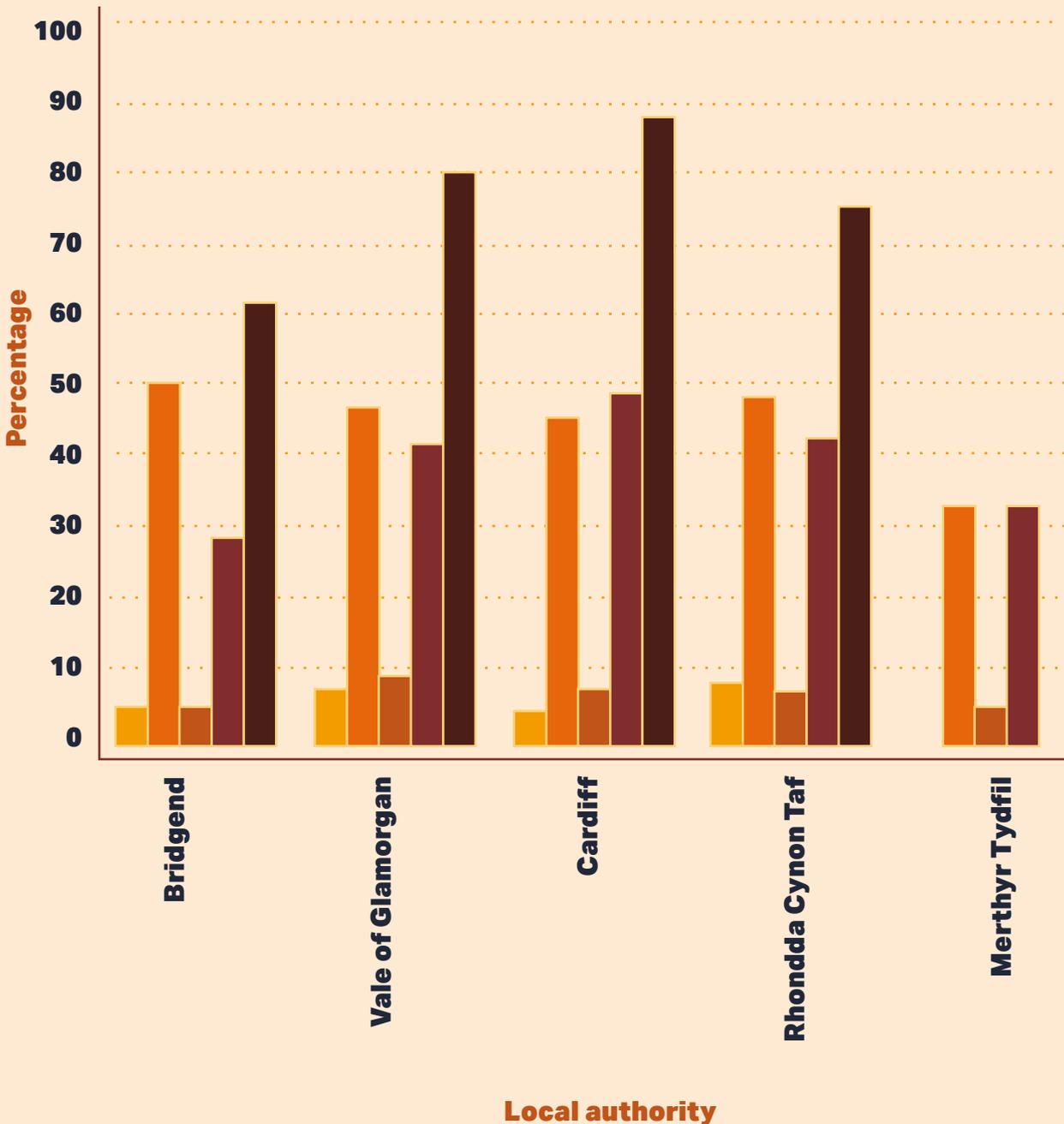


(Source: Office of National Statistics)

Chart 24: Percentage of children aged 3 to 4 in single-family households who can speak Welsh in central south Wales local authorities according to Census 2021, by household composition

Household composition

- Lone-parent household: no adults can speak Welsh
- Lone-parent household: one adult can speak Welsh
- Couple household: no adults can speak Welsh
- Couple household: one adult can speak Welsh
- Couple household: two or more adults can speak Welsh

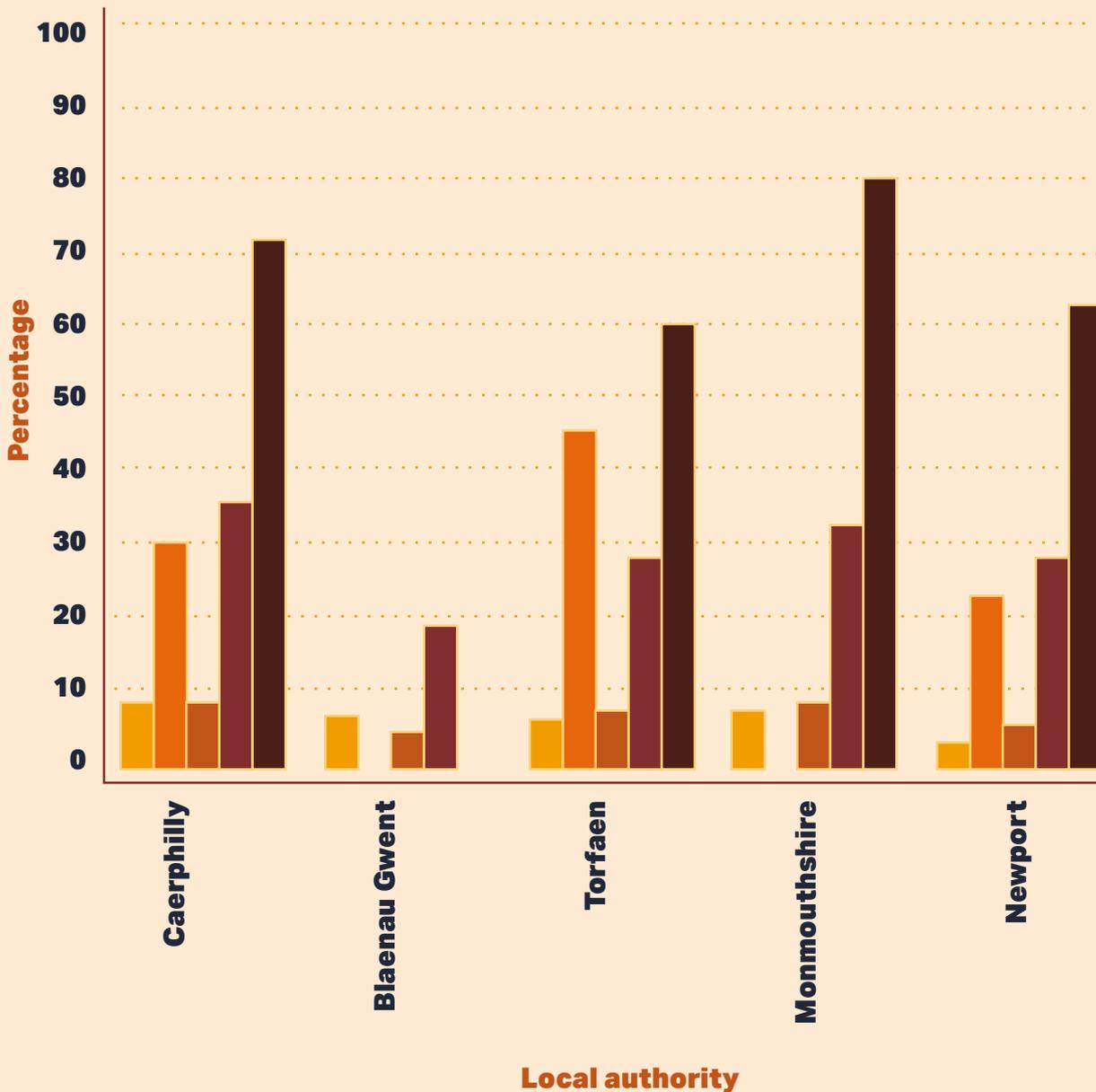


(Source: Office of National Statistics)

Chart 25: Percentage of children aged 3 to 4 in single-family households who can speak Welsh in south-east Wales local authorities according to Census 2021, by household composition

Household composition

- Lone-parent household: no adults can speak Welsh
- Lone-parent household: one adult can speak Welsh
- Couple household: no adults can speak Welsh
- Couple household: one adult can speak Welsh
- Couple household: two or more adults can speak Welsh



(Source: Office of National Statistics)

Transmission rates vary from local authority to local authority. For example, **in couple households where two or more adults can speak Welsh, the transmission rate is over 80% in eight of the local authorities.** It is highest in Cardiff (88.9%), Gwynedd (88.7%) and Ceredigion (83.6%). **At its lowest, the transmission rate is 60% in these homes in Torfaen and is lower still in Merthyr Tydfil and Blaenau Gwent.** It should be borne in mind that the number of homes in question here are relatively low, and the numbers are so low in some categories that it is not possible to identify percentages, to ensure that individuals remain anonymous.

The transmission rate varies more in lone-parent households where one adult can speak Welsh, from 77.8% in Ceredigion to 22.2% in Newport, and lower again in Blaenau Gwent and Monmouthshire. The rate is fairly high in north-west Wales, at 77% in Gwynedd and 65.9% in Anglesey. **But the transmission rate in this category in Cardiff is strikingly lower (45.8%). Almost half the rate of households where two adults speak Welsh in Cardiff.**

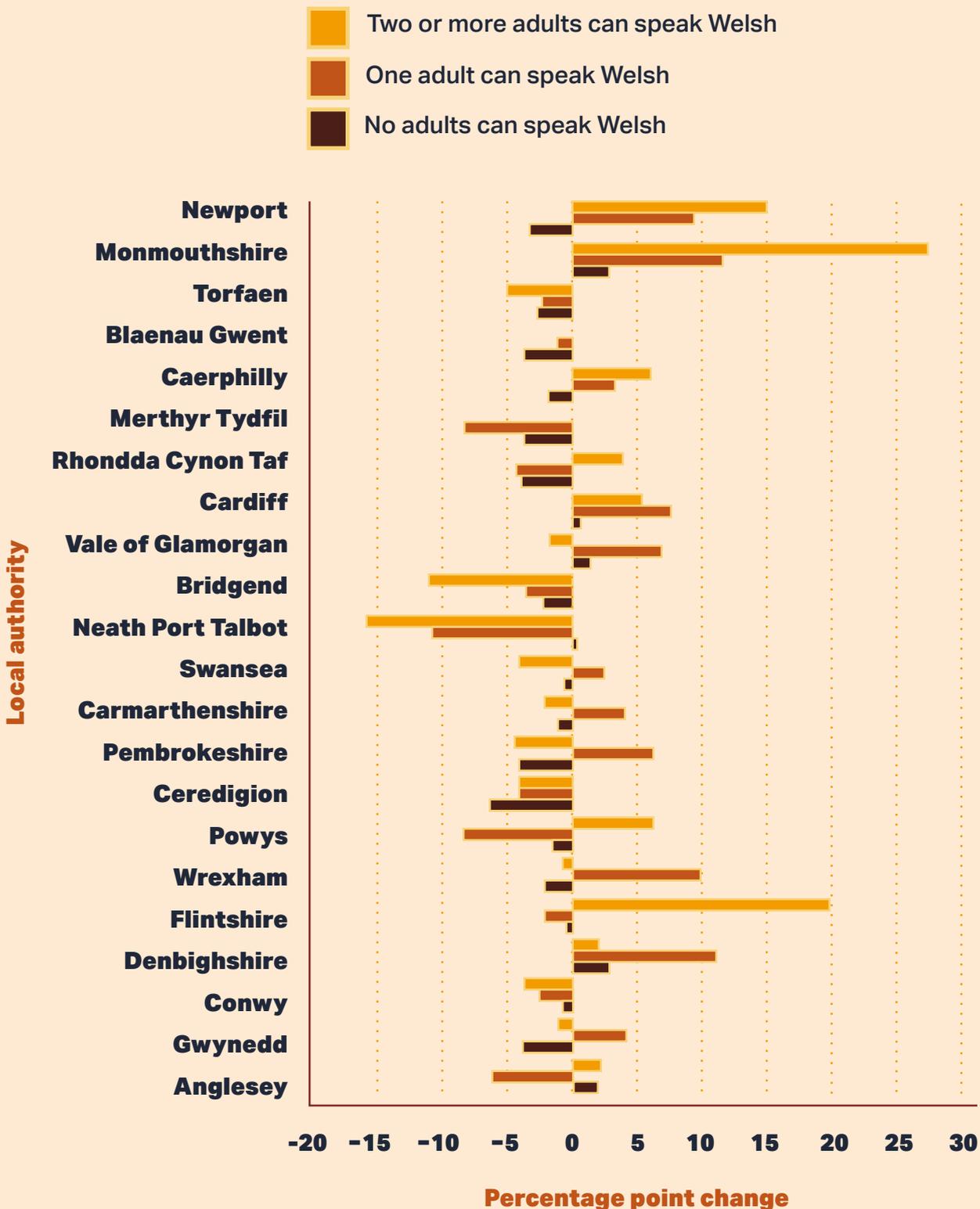
The transmission rate is lower in the case of couple households where only one adult speaks Welsh with the highest rates in Gwynedd (60%), Carmarthenshire (52%) and Ceredigion (49.1%). The lowest rate is found in Blaenau Gwent (18.8%).

In lone-parent households where no adults can speak Welsh, the transmission rate is highest in households in Gwynedd (31%), Ceredigion (27.3%), and Carmarthenshire (15.1%). In this category the lowest rate is in Newport (3.6%) and Merthyr Tydfil.

In couple households where no adults can speak Welsh, the transmission rate is once again highest in Gwynedd (28.6%), Ceredigion (19.6%) and Anglesey (16.7%) and lowest in Blaenau Gwent (3.8%). As already noted, household 'transmission' does not occur in these situations, of course, but the statistics are interesting in order to consider what other factors might be at play. Children can start going to school for a few hours before they are of statutory education age, for example.

8.2 Change in transmission rate between 2001 and 2021

Chart 26: Change in the percentage of children aged 3 to 4 in single-family couple households able to speak Welsh by household composition, by local authority (percentage point change), 2001–21



(Source: Office of National Statistics)

In couple households where two or more adults can speak Welsh, there has been an increase in the transmission rate in 9 of the 22 local authorities since 2001 with the largest increases in Monmouthshire (27.1 percentage point increase), Flintshire (19.9 percentage point increase) and Newport (15.1 percentage point increase). The largest decreases were seen in Neath Port Talbot (15.8 percentage point decrease), Bridgend (11 percentage point decrease), and Torfaen (5 percentage point decrease).

In couple households where one adult can speak Welsh there has been an increase in the transmission rate in half of the local authorities since 2001 with the largest increases in Denbighshire (11.2 percentage point increase), Monmouthshire (10.7 percentage point increase), and Wrexham (9.9 percentage point increase). The largest decreases were seen in Neath Port Talbot (10.7 percentage point decrease), Powys (8.4 percentage point decrease) and Merthyr Tydfil (8.2 percentage point decrease). It is also worth noting that **there has been an increase in this type of household in 21 of the 22 local authorities between 2011 and 2021.**

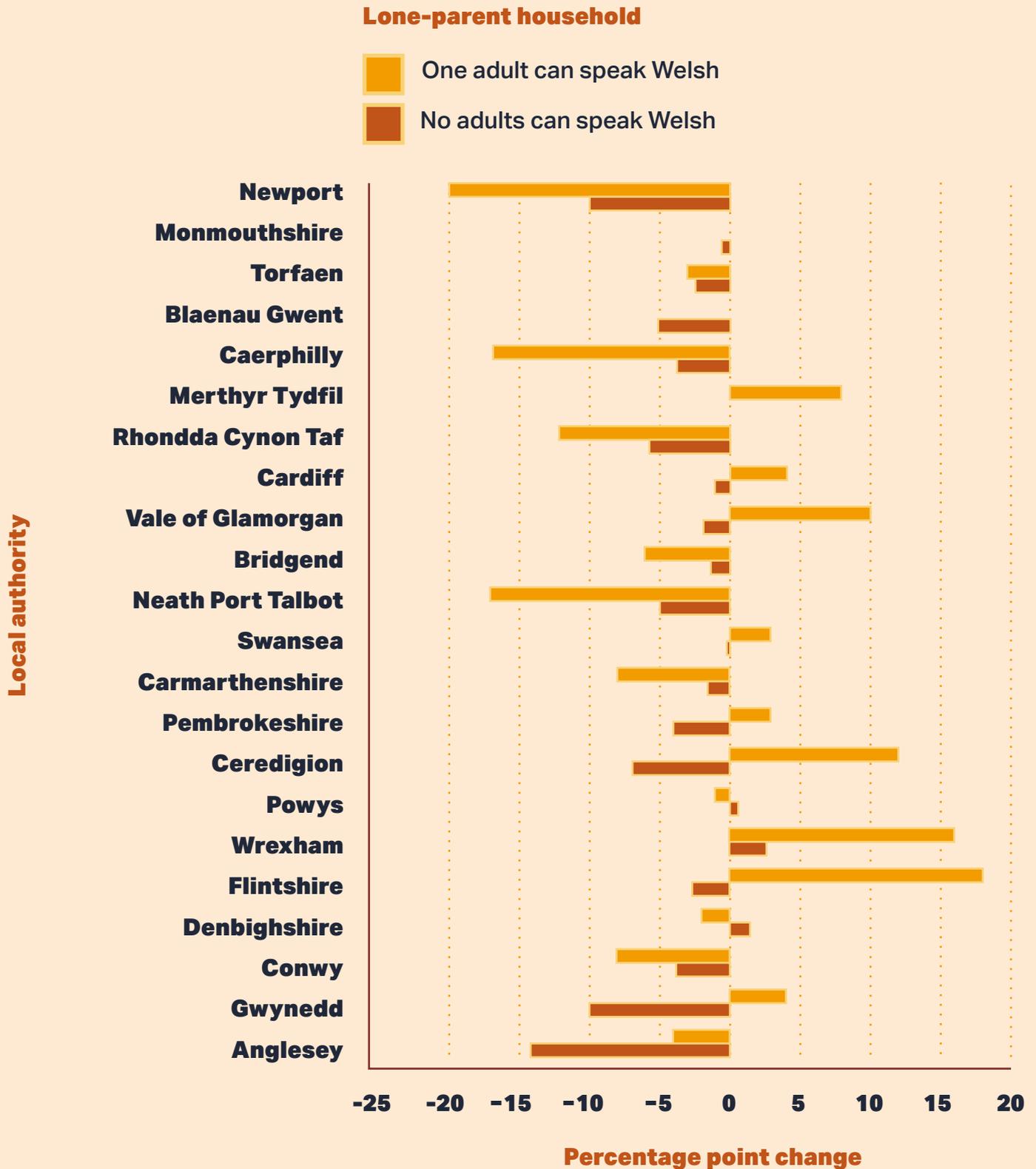
In lone-parent households where one adult can speak Welsh there has been an increase in the transmission rate in 9 of the 22 local authorities since 2001 with the largest increases in Flintshire (17.8 percentage point increase), Wrexham (15.5 percentage point increase) and Ceredigion (11.5 percentage point increase). The largest decrease in the transmission rate in this type of household was seen in Newport (20.1 percentage point decrease), Caerphilly (16.5 percentage point decrease), and Neath Port Talbot (16.9 percentage point decrease).

In couple households where no adults can speak Welsh, there has been an increase in the transmission rate in six local authorities, with the largest increases seen in Denbighshire (2.8 percentage point increase) and Monmouthshire (2.6 percentage point increase). There was no major change in the other 16 local authorities, but the largest decrease was seen in Ceredigion (6.4 percentage point decrease).

In lone-parent households where no adults can speak Welsh, there has been a slight increase in just three local authorities, in Wrexham (2.6 percentage point increase), Denbighshire (1.5 percentage point increase) and Powys (0.6 percentage point increase). The largest declines in transmission rates across the two decades were seen in Anglesey (14.1 percentage point decrease), Gwynedd (10 percentage point decrease) and Ceredigion (6.9 percentage point decrease).

It is important to highlight the contrast in transmission rates between 2001 to 2011 and 2011 to 2021 in lone-parent households where no adults can speak Welsh. There was an increase in the rate in 20 of 22 local authorities in the first decade and a decrease in all local authorities between 2011 and 2021, including a significant decrease in areas where the Welsh language has been strongest.

Chart 27: Change in the percentage of children aged 3 to 4 in single-family lone-parent households able to speak Welsh by household composition, by local authority (percentage point change), 2001–21



The Commissioner's conclusions



The Welsh transmission rate remains high in households where two adults can speak Welsh, but there is potential to increase the rate in this type of home in a number of local authorities in south Wales and in Wrexham and Conwy in north Wales.

Opportunities to transmit the language are often lost in lone-parent homes where only one adult speaks Welsh. Currently, just over half of 3- to 4-year-olds in such households acquire the language at home. **This rate could be increased in all local authorities, with particular attention to increasing the transmission rate in Cardiff.**

Additional support is also required to improve the transmission rate in couple households where one adult speaks Welsh. Currently, 40% of those aged 3 to 4 years in this type of household acquire the language at home.

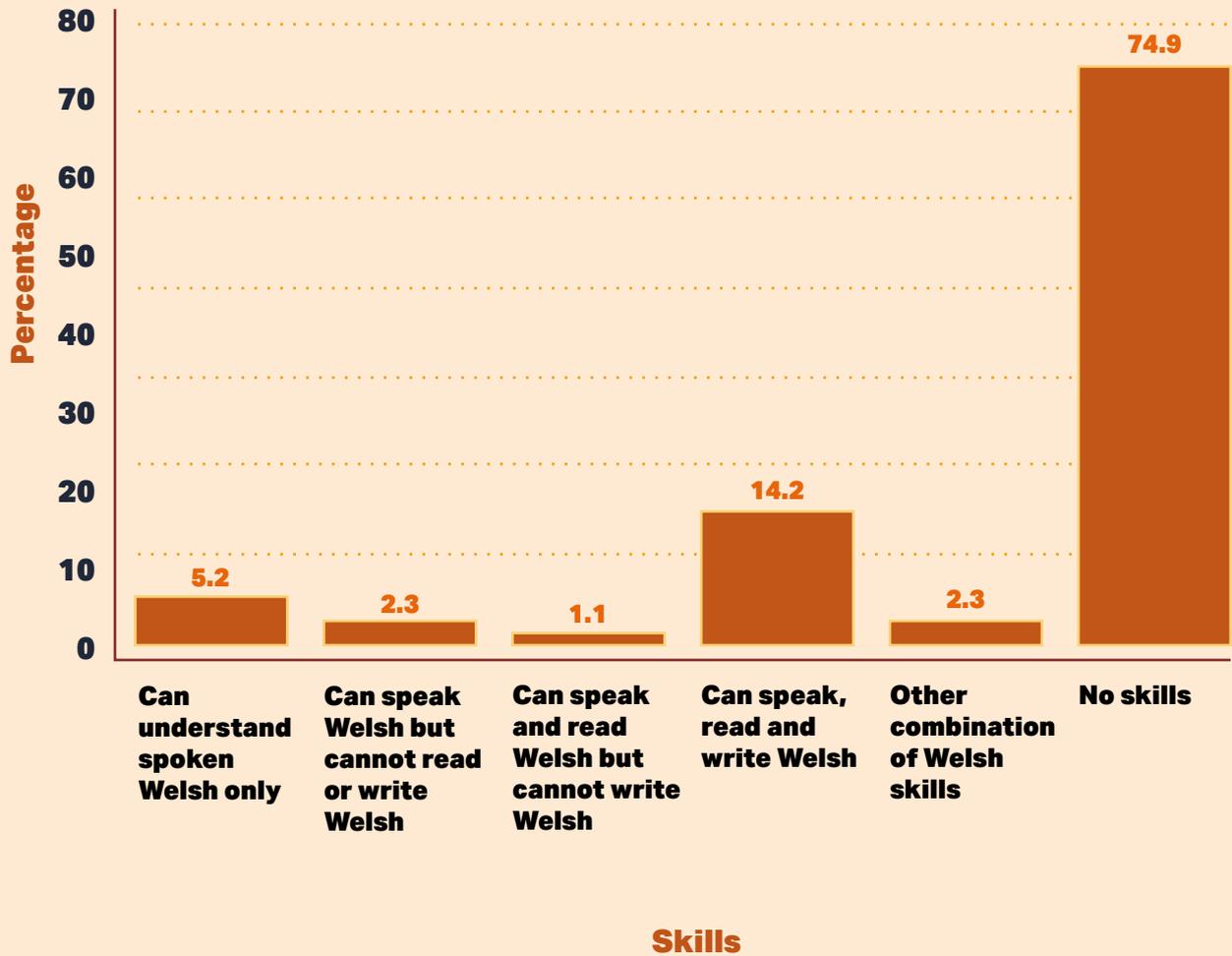
9. What language skills do Welsh speakers have?

The census questionnaire does not ask people how fluently they speak Welsh, instead it asks whether people can understand, speak, read or write Welsh.

The decrease of 23,720 since 2011 in the number of people who report that they can *speak* Welsh has already received considerable attention. But while the number of Welsh speakers in the 2021 Census has fallen, the percentage of remaining speakers who report having the full range of skills (able to speak, read and write Welsh) is encouraging.

14.2% of the population are able to read and write Welsh (a slight decrease from the 14.6% who reported this in 2011).

Chart 28: Number and percentage of people aged three years or older in Wales who can speak, understand, read or write Welsh according to Census 2021, by specific skill



(Source: Office of National Statistics)

Looking back over the decades, although the overall numbers of Welsh speakers have decreased over the period, **the language skills of Welsh speakers have remained relatively stable since 2001**. Moreover, there has been an increase in the percentage and number of Welsh speakers who can read and write Welsh in Wales since 1981. 70.6% of Welsh speakers were also able to read and write the language in 1981. This increased to 79.8% by 2021.

Chart 29: Percentage of Welsh speakers able to read and write Welsh in Wales, 1981–2021

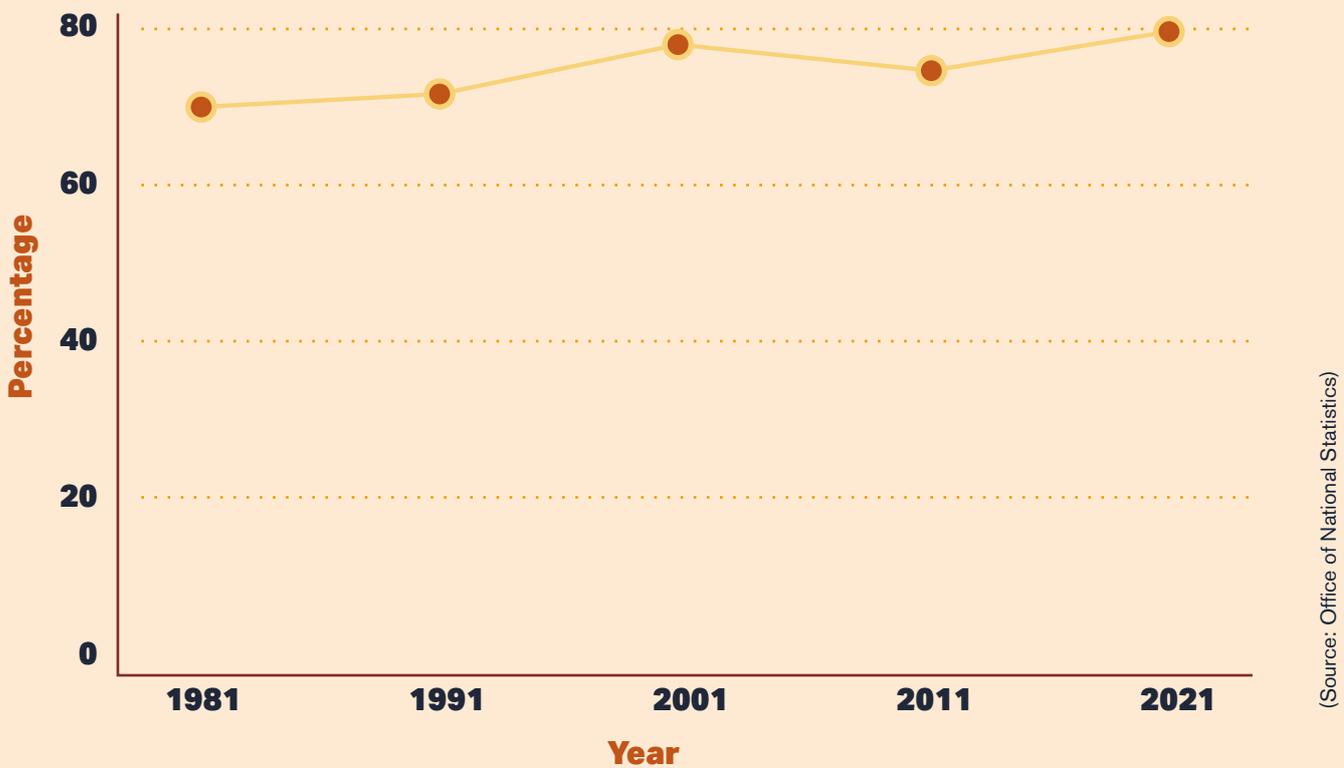
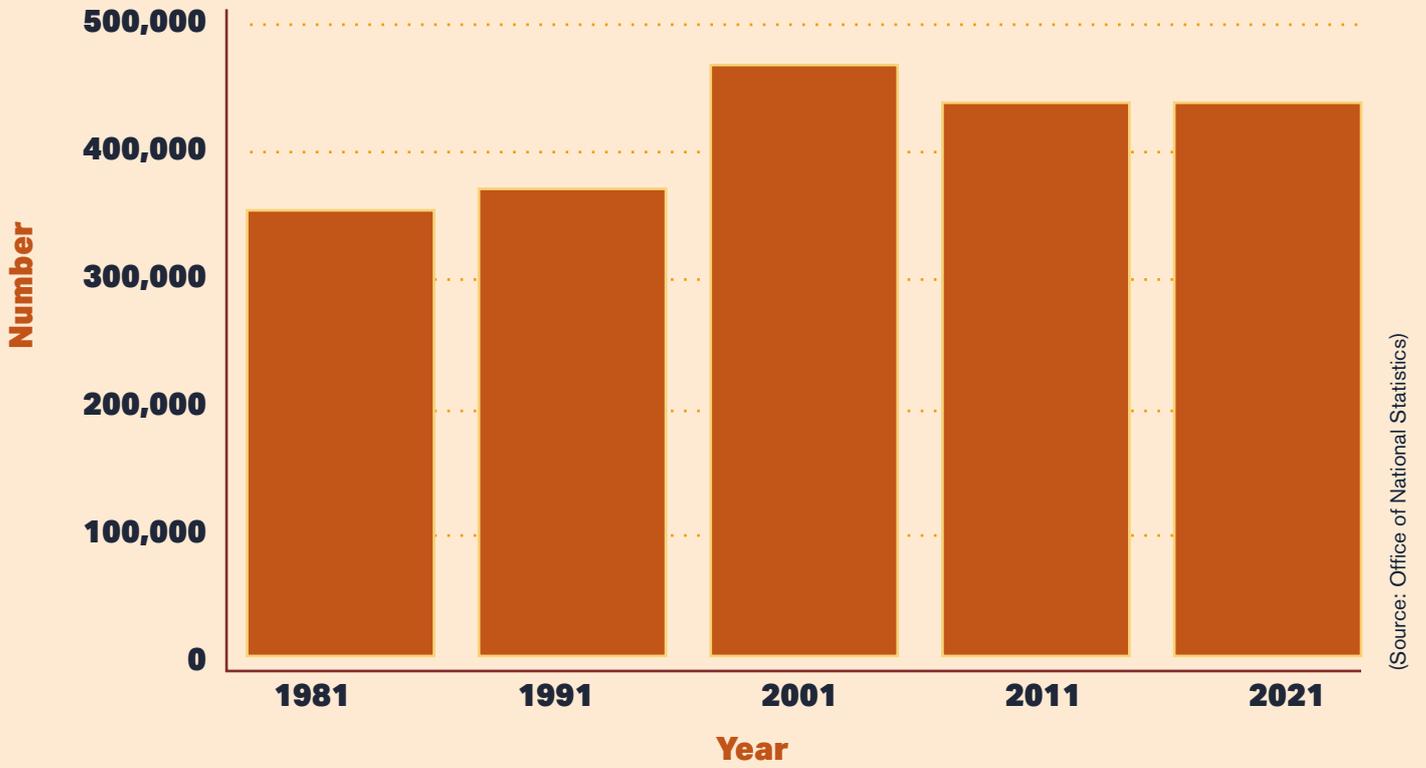


Chart 30: Number of people aged three years or older able to speak, read and write Welsh in Wales, 1981–2021



9.1 Language skills by local authority

Chart 31: Percentage of people aged three years or older according to Census 2021, by Welsh language skills in north Wales local authorities

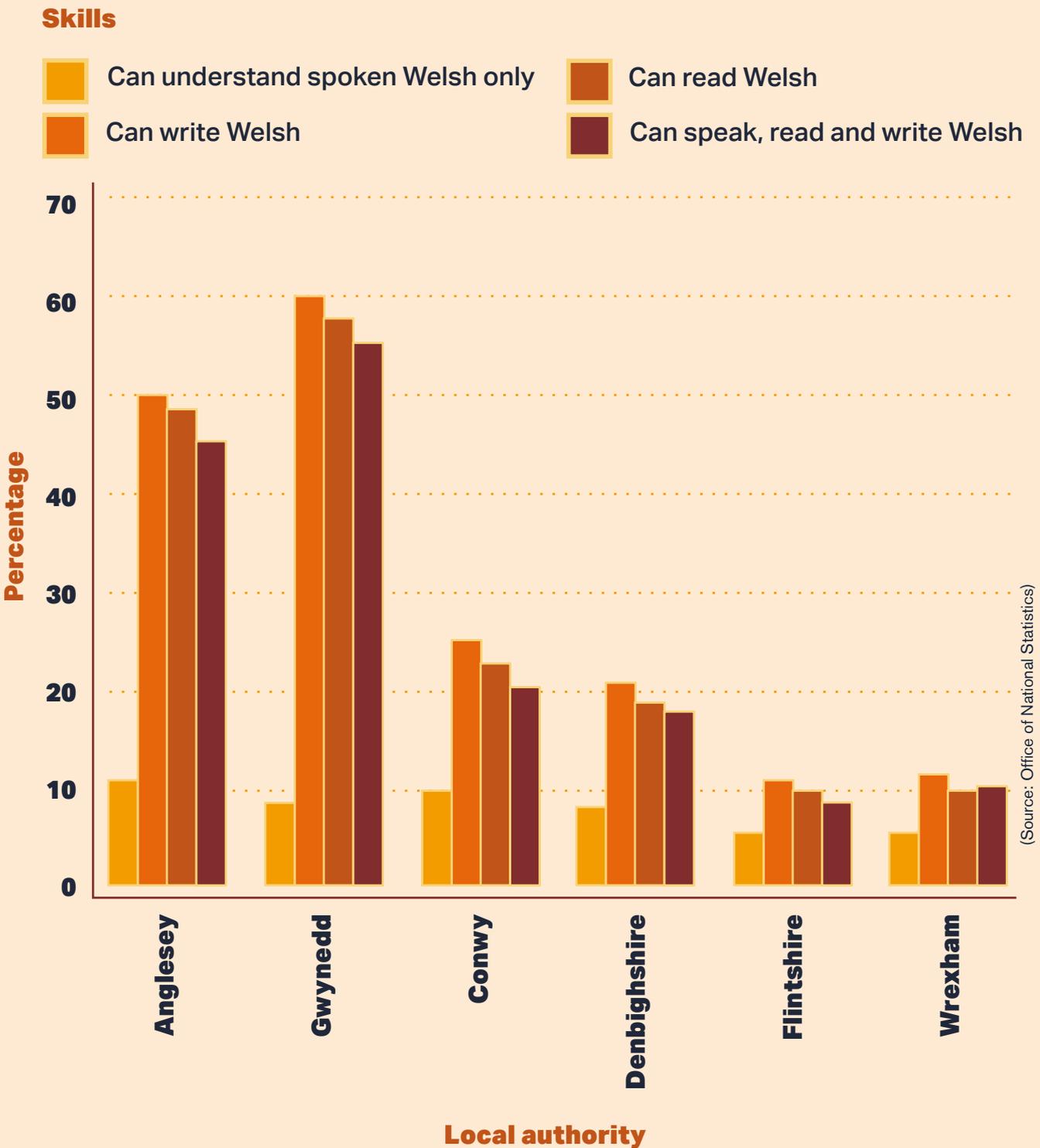


Chart 32: Percentage of people aged three years or older according to Census 2021, by Welsh language skills in south-west and mid Wales local authorities

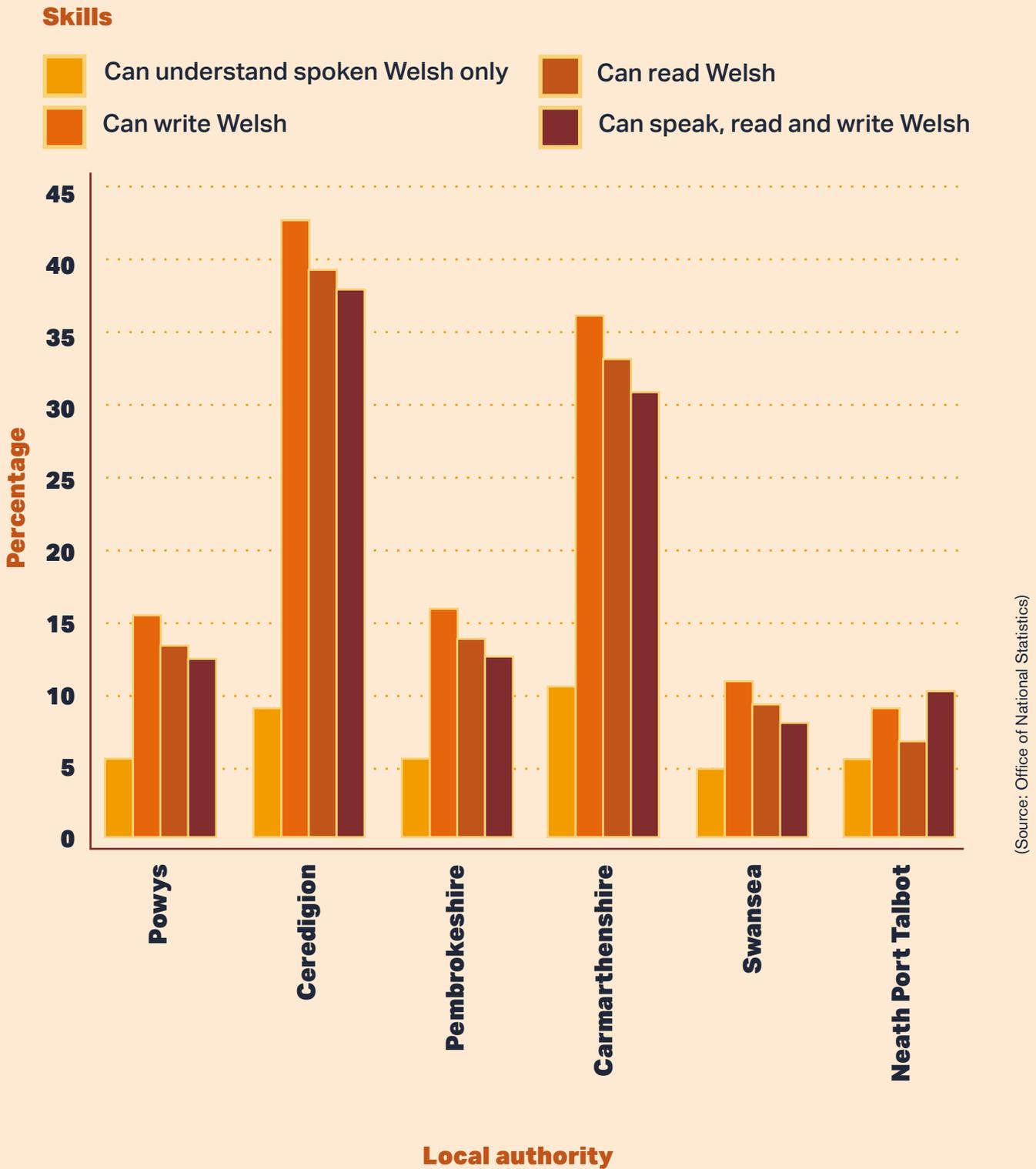


Chart 33: Percentage of people aged three years or older according to Census 2021, by Welsh language skills in central south Wales local authorities

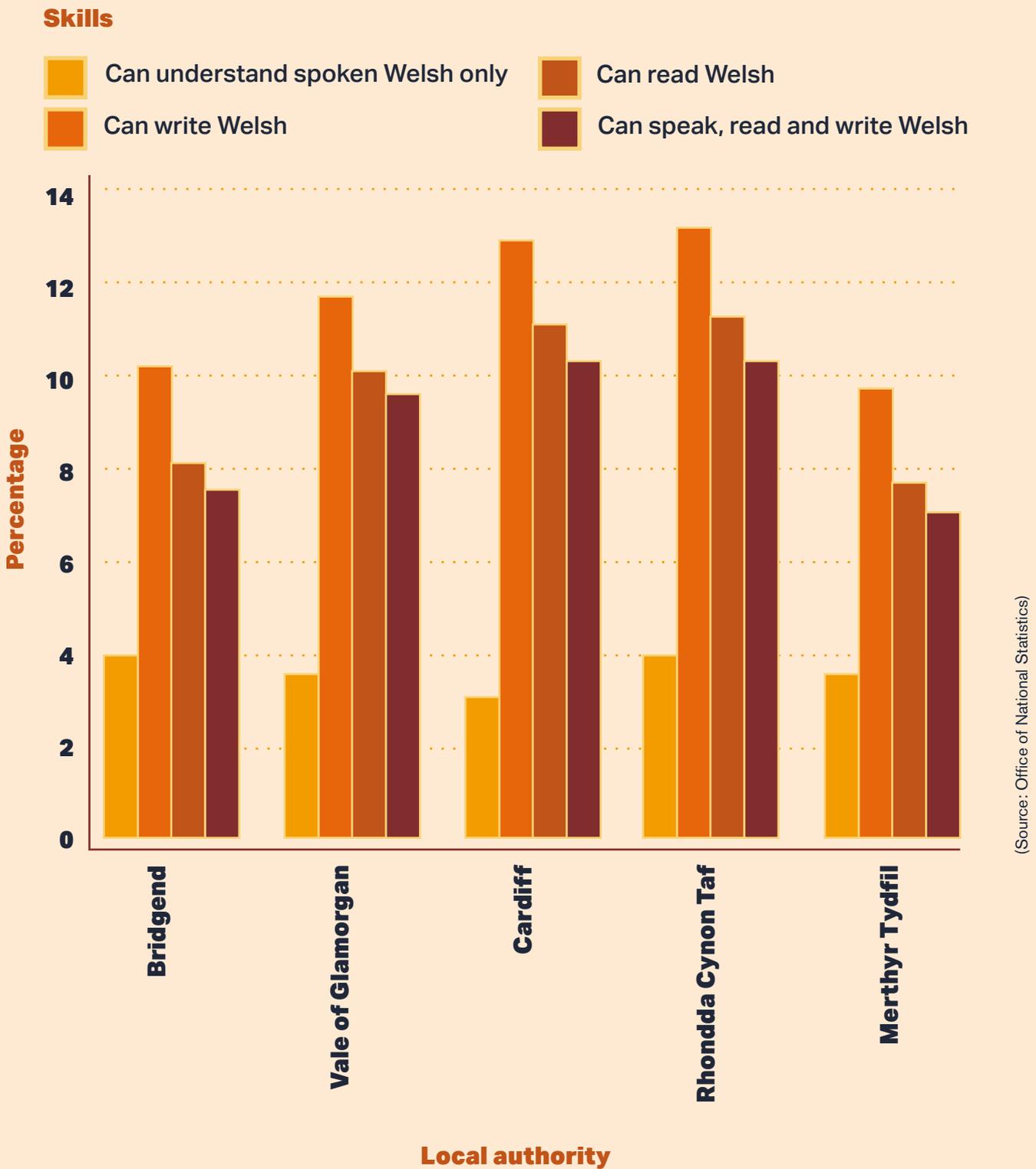
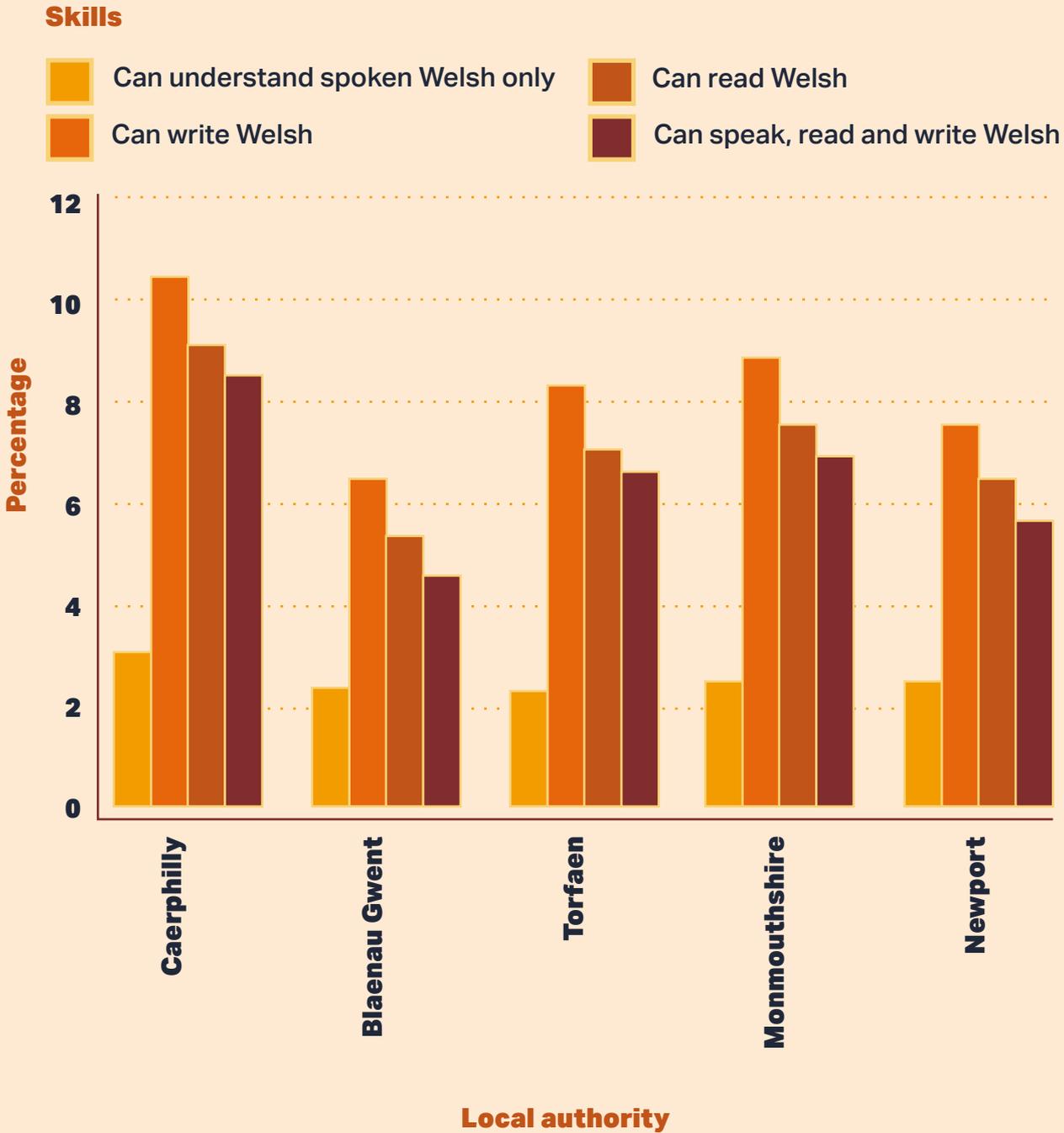


Chart 34: Percentage of people aged three years or older according to Census 2021, by Welsh language skills in south-east Wales local authorities



When Welsh language skills are considered at local authority level, the highest percentages of people with the full range of language skills are in Gwynedd, where 55.3% of the population there are able to speak, read and write in Welsh. 45.2% of the population of Anglesey and 37.3% of the population of Ceredigion have the full range of language skills. At the other end of the scale, the lowest percentages are in south-east Wales, in Blaenau Gwent where 4.7% of the population can speak, read and write in Welsh while the percentage is 5.7% in Newport and 6.5% in Torfaen.

But, as has already been seen in the case of speaking skills alone, the local authority rankings are different when we look at the *numbers* of speakers who can speak, read and write in Welsh. 63,256 of the population of Gwynedd have all these skills, 56,493 in Carmarthenshire, 35,578 in Cardiff and 30,316 in Anglesey.

It is interesting to note how similar the numbers are in Ceredigion, Conwy and Rhondda Cynon Taf. There is only a difference of just over 3,000 in the number of *speakers* between Rhondda Cynon Taf and Ceredigion, with Conwy in the middle between the two. And the numbers of speakers with the full range of skills are also quite similar, with 26,104 in Ceredigion, 23,345 in Rhondda Cynon Taf and 22,605 in Conwy. **Although there are more speakers in Conwy than in Rhondda Cynon Taf, there are more people who can speak, read and write in Rhondda Cynon Taf than in Conwy.** 77.9% of Welsh speakers in Conwy and 81.8% of Welsh speakers in Rhondda Cynon Taf have the full range of language skills.

More than 74% of Welsh speakers in each local authority have the full range of language skills. 86% of Welsh speakers in Gwynedd are able to speak, read and write in Welsh, 83.2% of Welsh speakers in Cardiff, and 82.4% of Welsh speakers in Ceredigion. It is interesting to note that the percentage is also in the low eighties in Rhondda Cynon Taf, Caerphilly, the Vale of Glamorgan and Anglesey meaning that Welsh speakers have higher Welsh language skills in these local authorities. On the other hand, 74.1% of Welsh speakers in Flintshire reported being able to speak, read and write in Welsh, 75% in Wrexham, and 75.2% in Newport.

Chart 35: Number of people aged three years or older according to Census 2021, by Welsh skills and local authority

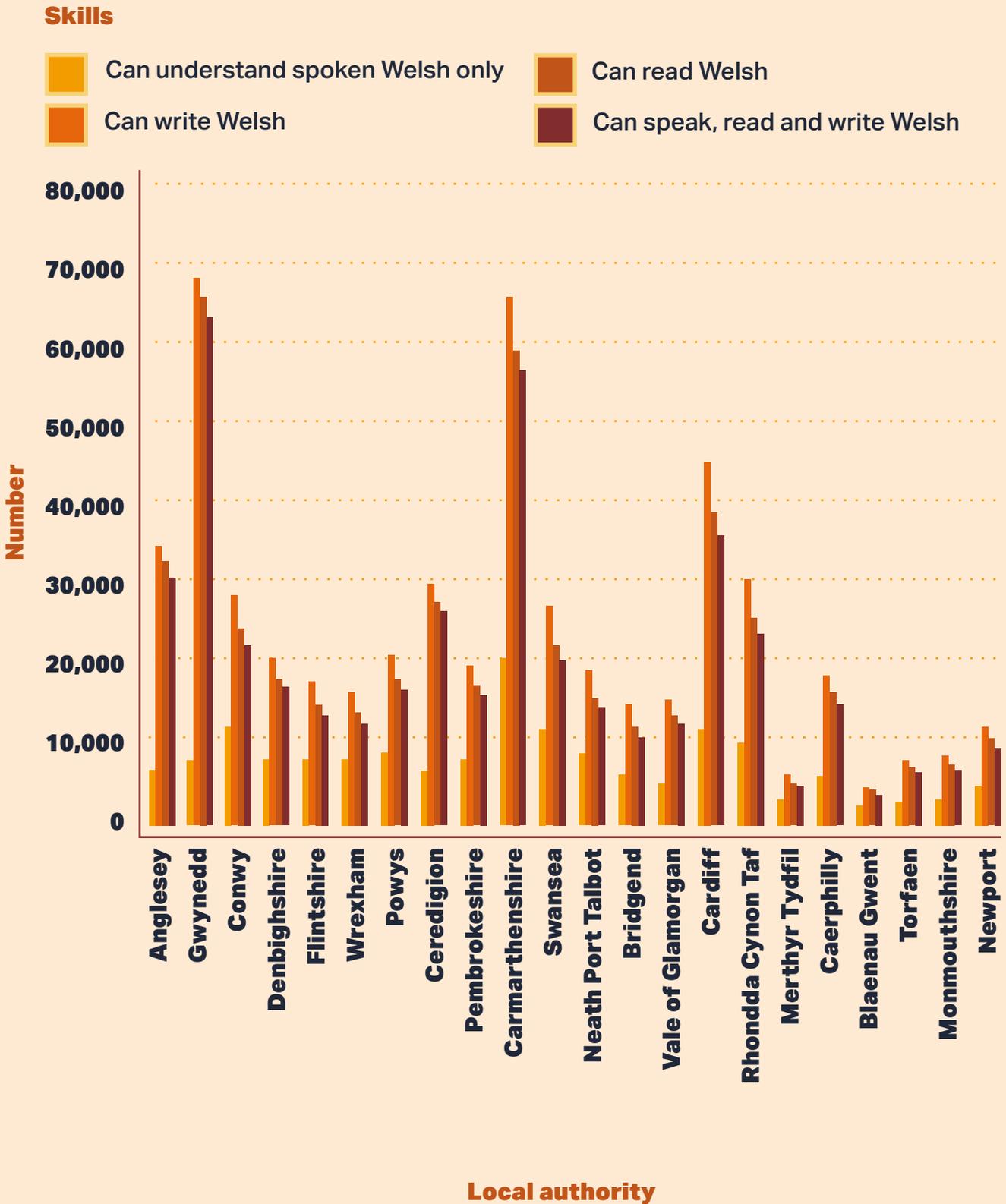


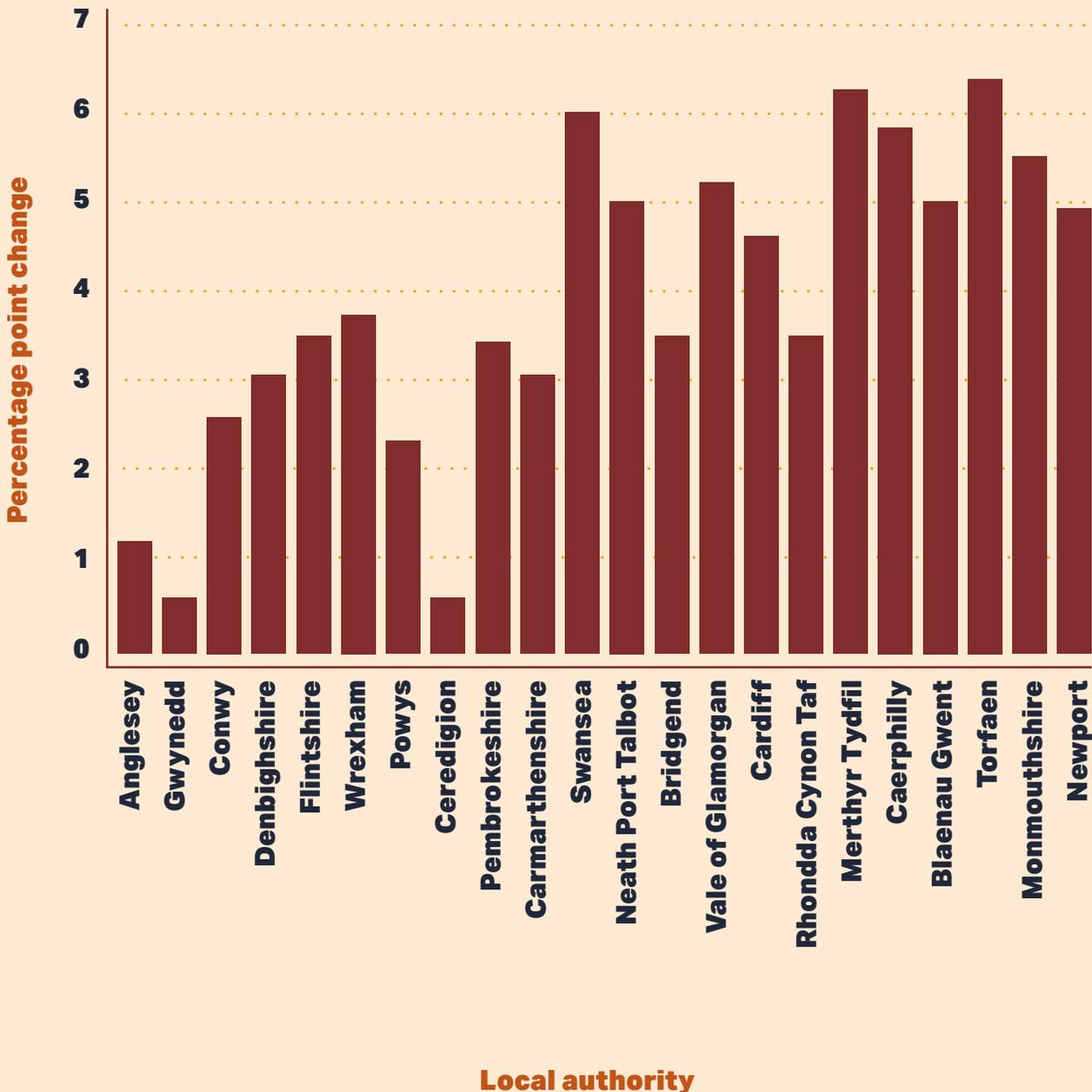
Table 21: Number and percentage of people aged three years or older according to Census 2021, by Welsh language skills and local authority

Local authority	Can understand spoken Welsh only		Can read Welsh		Can write Welsh		Can speak, read and write Welsh	
	Number	%	Number	%	Number	%	Number	%
Anglesey	7,468	11.1	33,967	50.6	31,479	46.9	30,316	45.2
Gwynedd	8,166	7.1	68,645	60.1	65,639	57.4	63,256	55.3
Conwy	10,707	9.6	27,354	24.5	24,010	21.5	22,605	20.2
Denbighshire	7,429	7.9	19,861	21.3	17,441	18.7	16,459	17.7
Flintshire	7,495	4.9	17,216	11.4	14,315	9.5	12,920	8.6
Wrexham	7,468	5.5	15,904	12.1	13,368	10.2	11,957	9.1
Powys	8,318	6.4	20,615	15.9	17,523	13.5	16,256	12.5
Ceredigion	5,948	8.5	29,569	42.3	27,137	38.8	26,104	37.3
Pembrokeshire	7,359	6.1	19,310	16.1	16,661	13.9	15,617	13.0
Carmarthenshire	19,995	10.9	6,5745	36	58,885	32.2	56,493	30.9
Swansea	11,345	4.9	26,801	11.6	21,867	9.4	19,951	8.6
Neath Port Talbot	8,032	5.8	18,582	13.4	15,238	11.0	14,095	10.2
Bridgend	5,500	3.9	14,504	10.3	11,385	8.1	10,177	7.2
Vale of Glamorgan	4,488	3.5	14,998	11.7	12,802	10	11,946	9.3
Cardiff	11,157	3.2	44,910	12.8	38,566	11.0	35,578	10.1
Rhondda Cynon Taf	9,261	4.0	30,017	13	25,246	11.0	23,345	10.1
Merthyr Tydfil	2,074	3.6	5,462	9.6	4,453	7.8	4,052	7.1
Caerphilly	5,266	3.1	18,145	10.6	15,746	9.2	14,502	8.5
Blaenau Gwent	1,508	2.3	4,054	6.3	3,514	5.4	3,048	4.7
Torfaen	2,007	2.3	7,329	8.2	6,435	7.2	5,783	6.5
Monmouthshire	2,273	2.5	7,916	8.7	6,816	7.5	6,133	6.8
Newport	3,827	2.5	11,510	7.5	9,938	6.5	8,717	5.7

9.2 Change in language skills over time, at local authority level

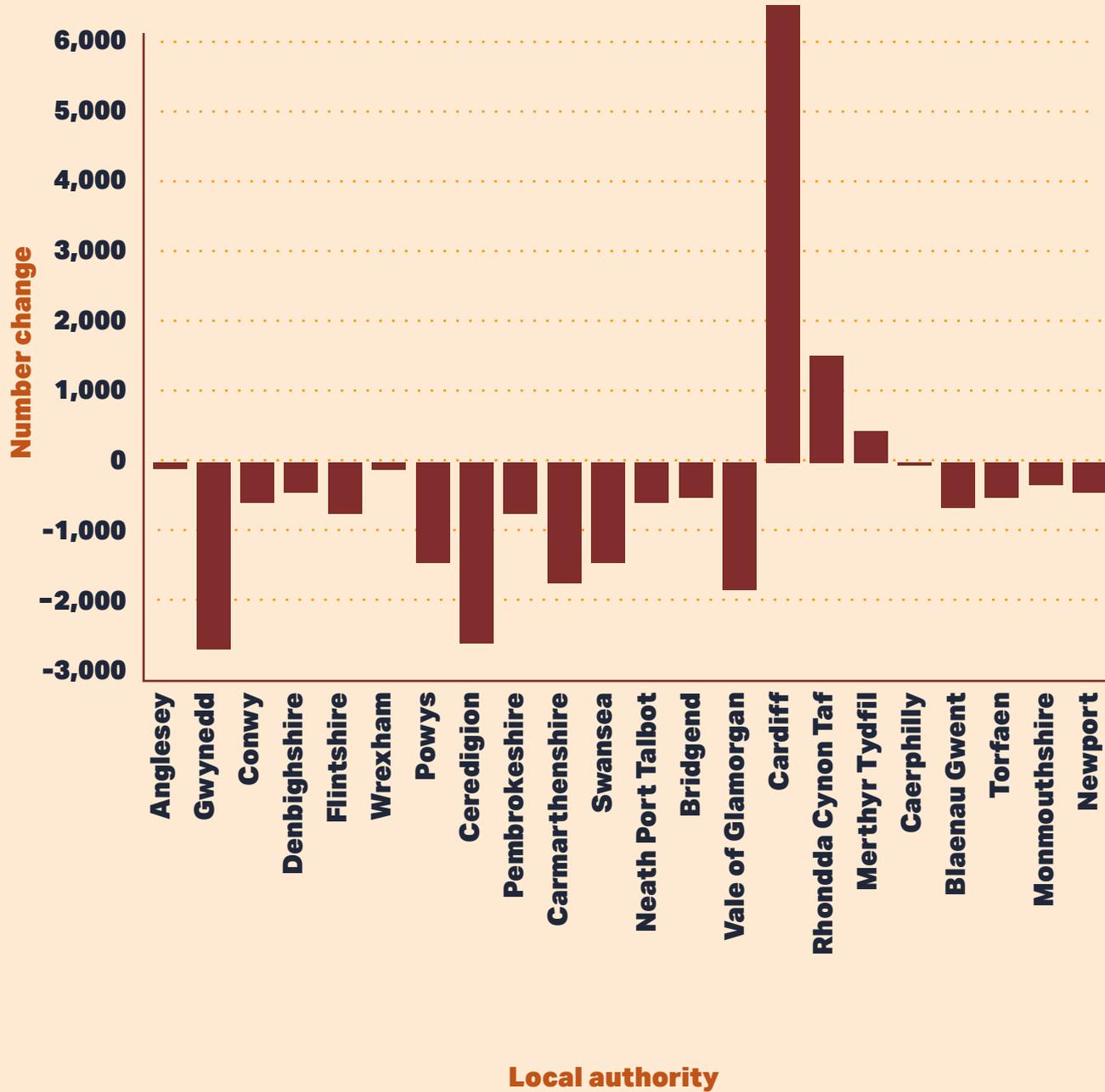
The percentage of Welsh speakers who were able to speak, read and write in Welsh in all local authorities increased since 2011. The percentage increase in the local authorities in the south-east is consistently greater than the increase in the rest of Wales.

Chart 36: Change in the percentage of Welsh speakers who can read and write Welsh according to Census 2021, by local authority (percentage point change), 2011–21



(Source: Office of National Statistics)

Chart 37: Change in the number of people aged three years or older who are able to speak, read and write Welsh, by local authority, 2011–21



(Source: Office of National Statistics)

Torfaen recorded the largest increase, from 72.3% in 2011 to 78.5% in 2021. As the percentage and number of Welsh speakers has decreased in Torfaen over the decade, it is only natural that the number of speakers who have the full range of language skills has also fallen by 467. But although there are fewer speakers in Torfaen today than there were in 2011, the speakers there today have higher skill levels than in 2011.

The second-largest increase in the percentage of speakers able to speak, read and write in Welsh was seen in Merthyr Tydfil from 73.7% in 2011 to 79.8% in 2021, and in Swansea from 70.8% to 76.8%. Unlike in Torfaen, the number of these speakers also increased in both local authorities. There was an increase of 346 people in Merthyr Tydfil and an increase of 1,317 people in Swansea.

There was little change in the percentage and number of Welsh speakers in Merthyr Tydfil and Swansea between 2011 and 2021. **The increase of 6.1 and 6 percentage points in the percentage of speakers possessing the full range of language skills over the decade is therefore positive and shows that there are higher skills among Welsh speakers in both local authorities today.**

The smallest increase in the percentages of Welsh speakers able to speak, read and write were in Gwynedd, Ceredigion and Anglesey where the percentages were already high in 2011. As the number of speakers in these three local authorities decreased, so too did the number of speakers with the full range of language skills.

Four local authorities saw an increase in the numbers of Welsh speakers as noted at the beginning of this section (Cardiff, Vale of Glamorgan, Rhondda Cynon Taf and Merthyr Tydfil), and those authorities also saw a corresponding rise in the numbers of people able to speak, read and write Welsh.

There was an increase of 419 people in Bridgend who possessed the full range of language skills and an increase of 90 in Wrexham, but the numbers in the other 15 local authorities decreased with the decrease in the overall number of speakers.

9.3 Passive speakers

Passive speakers – people who can *understand* Welsh to some degree but do not report being able to speak it – are another group of people who deserve attention. According to the 2021 Census, **5.2% of the population of Wales can understand spoken Welsh only.** That equates to 156,762 people. This group is distinct from the 17.8% who report they can speak Welsh.

The aim of focusing on passive speakers is to try to better understand the potential of these people who understand spoken Welsh to facilitate situations where speakers with the full range of skills can confidently use them. For example, by being part of Welsh conversations where the passive speakers can understand everything even though they themselves need to contribute in English.

This group is also significant as they have a linguistic advantage and the potential to cross the bridge to become *Welsh speakers*.

9.4 Passive speakers at local authority level

The highest percentages of passive speakers can be found in the local authorities that have traditionally had a very high density of Welsh speakers. 11.1% of the population of Anglesey noted that they could only understand spoken Welsh. The percentage was 10.9% in Carmarthenshire, 9.6% in Conwy, 8.5% in Ceredigion and 7.1% in Gwynedd.

Table 23: Number and percentage of people aged three years or older who understand spoken Welsh only according to Census 2021, by local authority

Local authority	Number	Percentage
Anglesey	7,468	11.1
Gwynedd	8,166	7.1
Conwy	10,707	9.6
Denbighshire	7,429	8.0
Flintshire	7,495	5.0
Wrexham	7,468	5.5
Powys	8,318	6.4
Ceredigion	5,948	8.5
Pembrokeshire	7,359	6.1
Carmarthenshire	19,995	10.9
Swansea	11,345	4.9
Neath Port Talbot	8,032	5.8
Bridgend	5,500	3.9
Vale of Glamorgan	4,488	3.5
Cardiff	11,157	3.2
Rhondda Cynon Taf	9,261	4.0
Merthyr Tydfil	2,074	3.6
Caerphilly	5,266	3.1
Blaenau Gwent	1,508	2.3
Torfaen	2,007	2.3
Monmouthshire	2,273	2.5
Newport	3,827	2.5

(Source: Office of National Statistics)

The percentages of Ceredigion and Carmarthenshire are significant as both local authorities have experienced a significant reduction in the percentages able to speak Welsh in recent censuses, **but the high percentages of passive speakers in both areas suggest the potential, at the very least, to reverse this linguistic shift.**

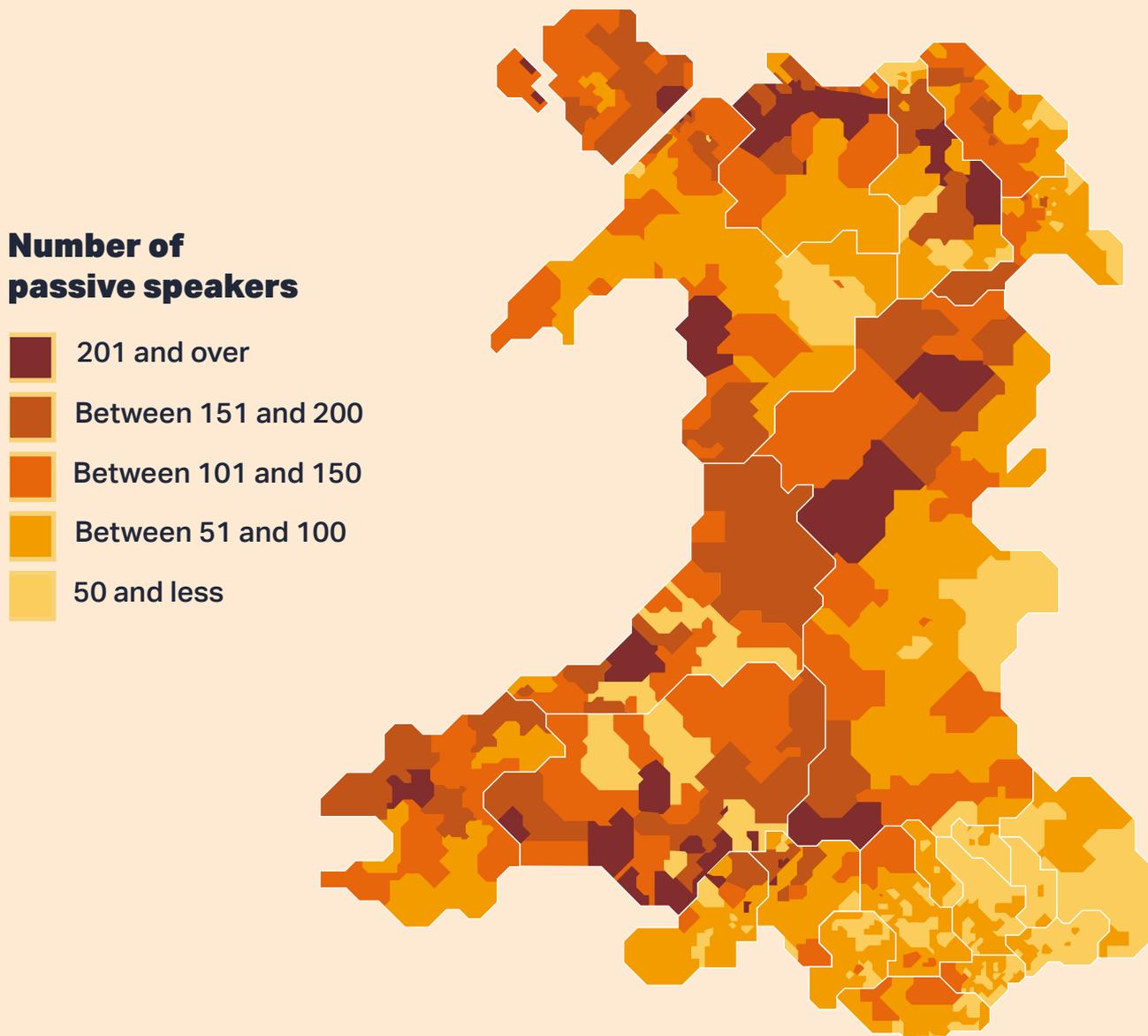
The highest numbers of passive speakers are found either in local authorities where there has been a decrease in the number of speakers (Carmarthenshire and Conwy, for example) or in local authorities where numbers are increasing (Cardiff and Rhondda Cynon Taf are prime examples).

There are 11,157 passive speakers in Cardiff and almost 20,000 in Carmarthenshire.

9.5 Passive speakers at the Lower Super Output Areas level (small areas)

We have already highlighted the benefit of mapping speakers at a small area level and Map 10 highlights the small pockets where high numbers of passive speakers live, for example, in areas of north-east Wales, parts of Powys, east Carmarthenshire and Swansea.

Map 10: Number of people aged three years or older who can understand spoken Welsh only according to the 2021 Census, on the Lower Super Output Area scale (small areas)



9.6 Bringing Welsh speakers and passive speakers together

By combining the data on passive speakers with data about the numbers of people able to speak Welsh, we can better understand the potential of passive speakers to transform the position of the Welsh language.

At local authority level, the patterns seen in Map 11 are familiar enough and confirm the significance of the areas with a high density of Welsh speakers for the development of passive speakers' language skills and the potential for language use.

But it also highlights the **potential to increase the skills and use of Welsh in areas such as Carmarthenshire, Swansea and Rhondda Cynon Taf**, as there are high numbers of Welsh speakers and passive speakers in these areas.

Map 11: Number of people aged three years or older who can speak Welsh and people who can understand spoken Welsh only according to Census 2021, by local authority

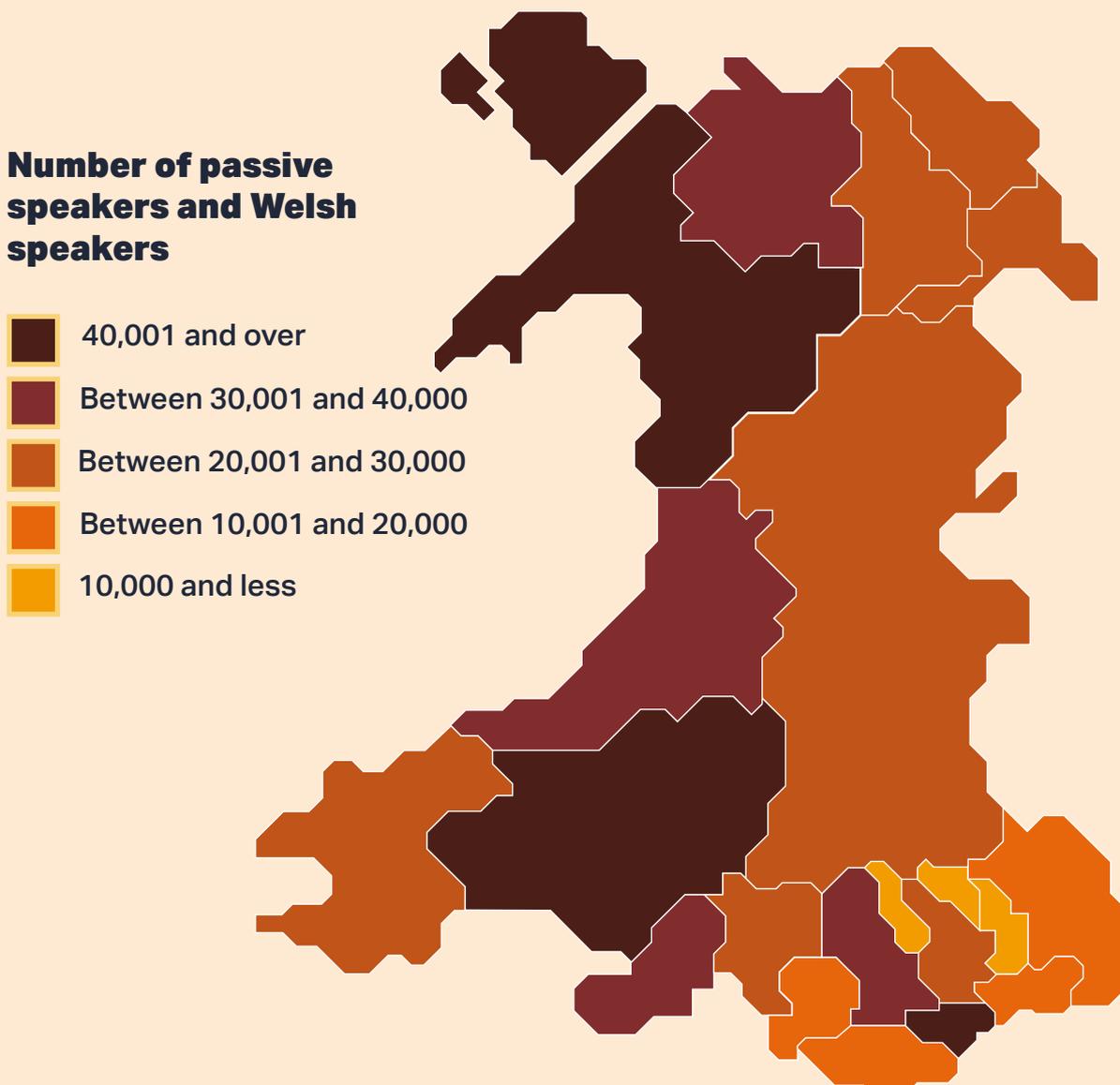


Table 24: Number and percentage of people aged three years or older who can speak Welsh and people who understand spoken Welsh only in 2021, by local authority

Local authority	Can speak Welsh		Can understand spoken Welsh only		Total	
	Number	%	Number	%	Number	%
Anglesey	37,413	55.8	7,468	11.1	44,881	66.9
Gwynedd	73,560	64.4	8,166	7.1	81,726	71.5
Conwy	29,000	25.9	10,707	9.6	39,707	35.5
Denbighshire	20,946	22.5	7,429	7.9	28,375	30.4
Flintshire	17,428	11.6	7,495	4.9	24,923	16.5
Wrexham	15,953	12.2	7,468	5.5	23,421	17.7
Powys	21,358	16.4	8,318	6.4	29,676	22.8
Ceredigion	31,678	45.3	5,948	8.5	37,626	53.8
Pembrokeshire	20,626	17.2	7,359	6.1	27,985	23.3
Carmarthenshire	72,838	39.9	19,995	10.9	92,833	50.8
Swansea	25,986	11.2	11,345	4.9	37,331	16.1
Neath Port Talbot	18,662	13.5	8,032	5.8	26,694	19.3
Bridgend	13,037	9.2	5,500	3.9	18,537	13.1
Vale of Glamorgan	14,737	11.5	4,488	3.5	19,225	15.0
Cardiff	42,757	12.2	11,157	3.2	53,914	15.4
Rhondda Cynon Taf	28,556	12.4	9,261	4.0	37,817	16.4
Merthyr Tydfil	5,079	8.9	2,074	3.6	7,153	12.5
Caerphilly	17,837	10.5	5,266	3.1	23,103	13.6
Blaenau Gwent	4,035	6.2	1,508	2.3	5,543	8.5
Torfaen	7,366	8.2	2,007	2.3	9,373	10.5
Monmouthshire	7,852	8.7	2,273	2.5	10,125	11.2
Newport	11,594	7.5	3,827	2.5	15,421	10.0

The Commissioner's conclusions



The percentage of people who can speak, read and write in Welsh has remained broadly stable since 2011, with 14.2% of the Welsh population now possessing the full range of language skills.

At least three quarters of Welsh speakers in all local authorities are also able to read and write in Welsh, and the percentage of speakers who can also read and write has increased in all local authorities since 2011. The growth seen in local authorities in south-east Wales is also encouraging and consistently greater than the increase in the rest of Wales.

Although there are fewer Welsh speakers overall than there were in 2011, a larger proportion of those remaining speakers have the full range of language skills.

With 156,762 people in Wales reporting that they can understand spoken Welsh but not speak it, there is clear potential to support this group to develop their skills and become Welsh speakers. The highest percentages of these passive speakers are found in the areas where the Welsh language is strongest, and therefore it could be assumed that there are opportunities in those areas for passive speakers to practise and use Welsh in social situations. **There is also a need to consider how to utilise these passive speakers in the workplace, for example by upskilling them so that they can provide Welsh language services**, or by creating situations where Welsh speakers can use more Welsh in their company.

10. Where do Welsh speakers come from? And what ethnic groups do they belong to?

10.1 Welsh speakers' country of birth

Understanding where Welsh speakers were born is important in order to see how many people born in Wales are able to speak Welsh, and how many people born outside Wales have the opportunity to become Welsh speakers in due course. As expected, **the vast majority (87.9%) of Welsh speakers were born in Wales**, and the majority of the rest were born in another UK nation (10.5%).

Looking at the population as a whole, 71% of the Welsh population was born in Wales. 21% were born in England, 7% outside the UK, and 1% in another UK country. **Of the people born in Wales aged three or over, 22.3% can speak Welsh**, which equates to 473,059 people.

Chart 38: Percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by country of birth

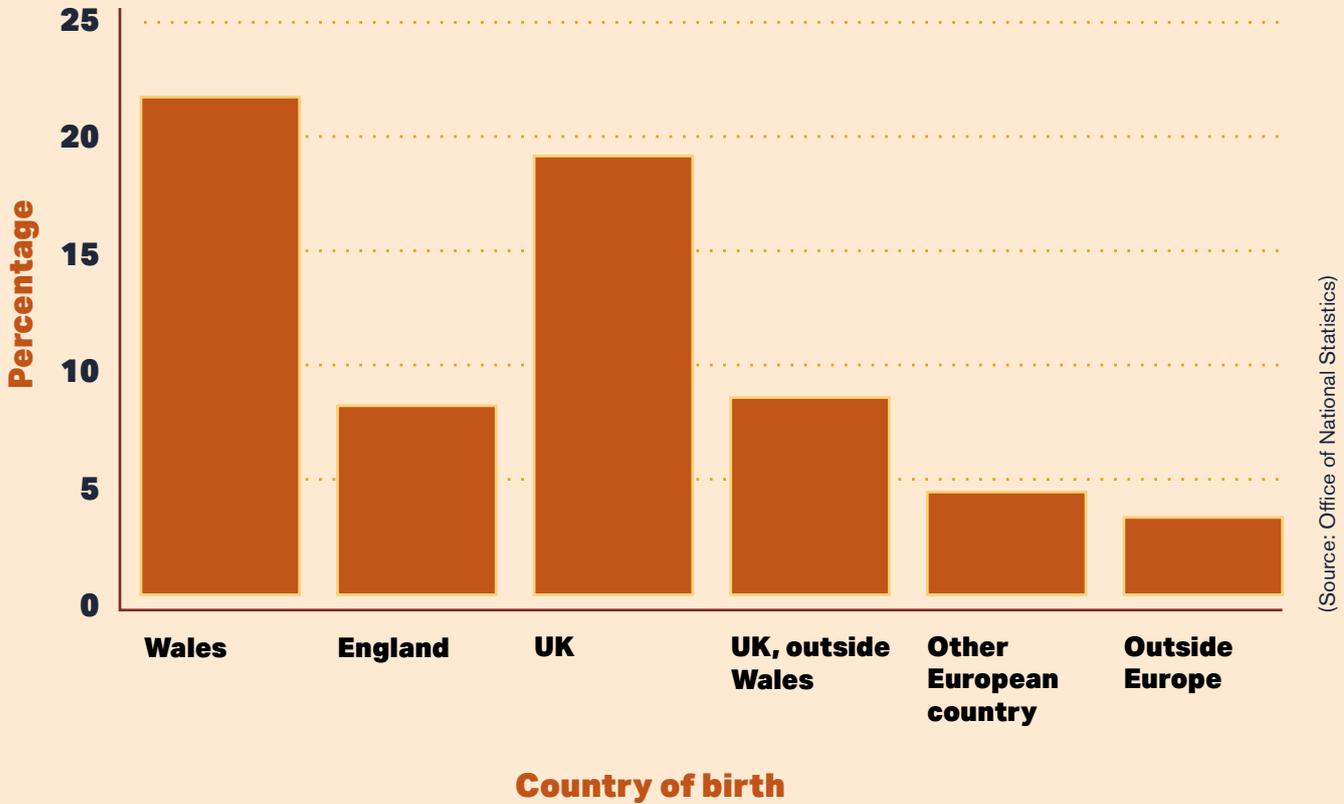
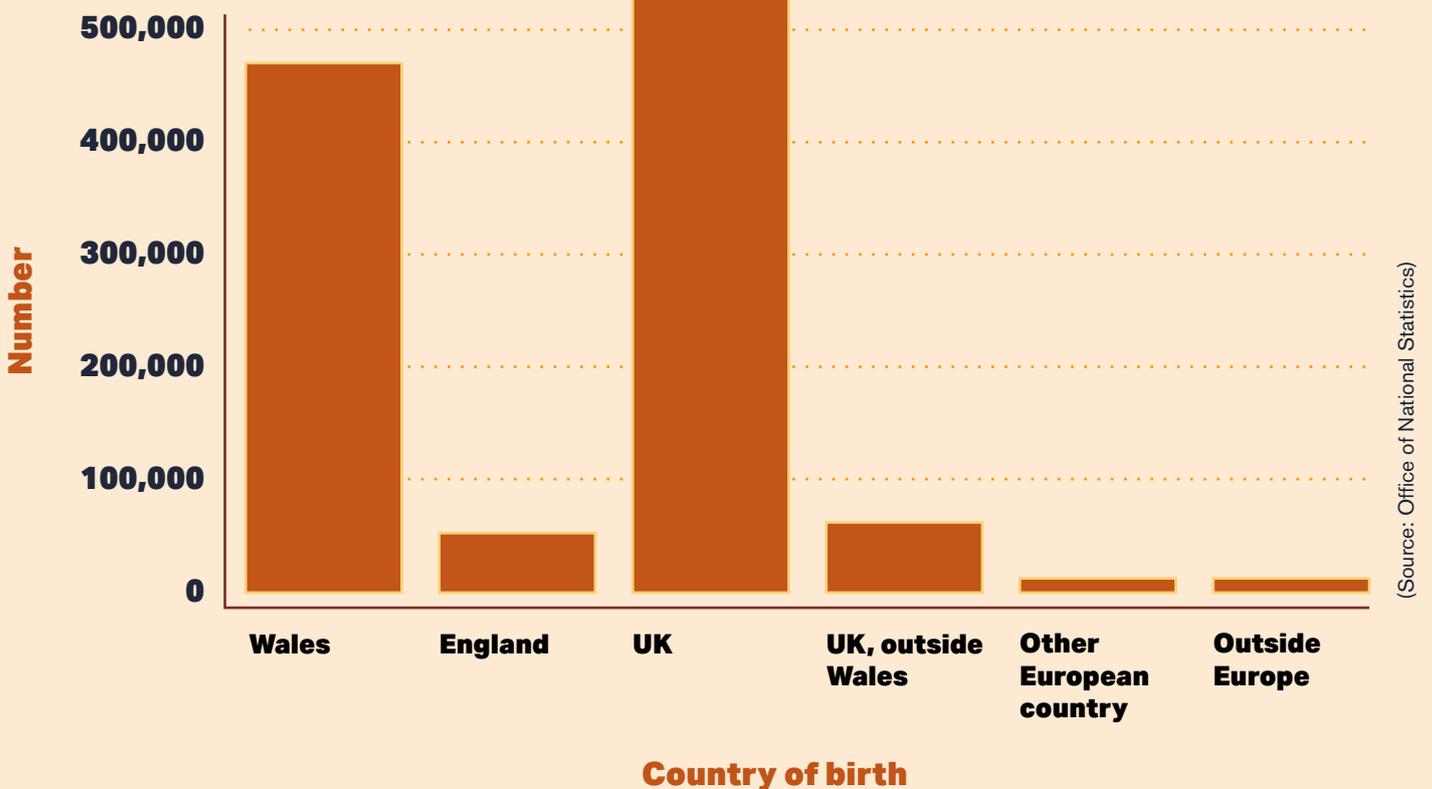
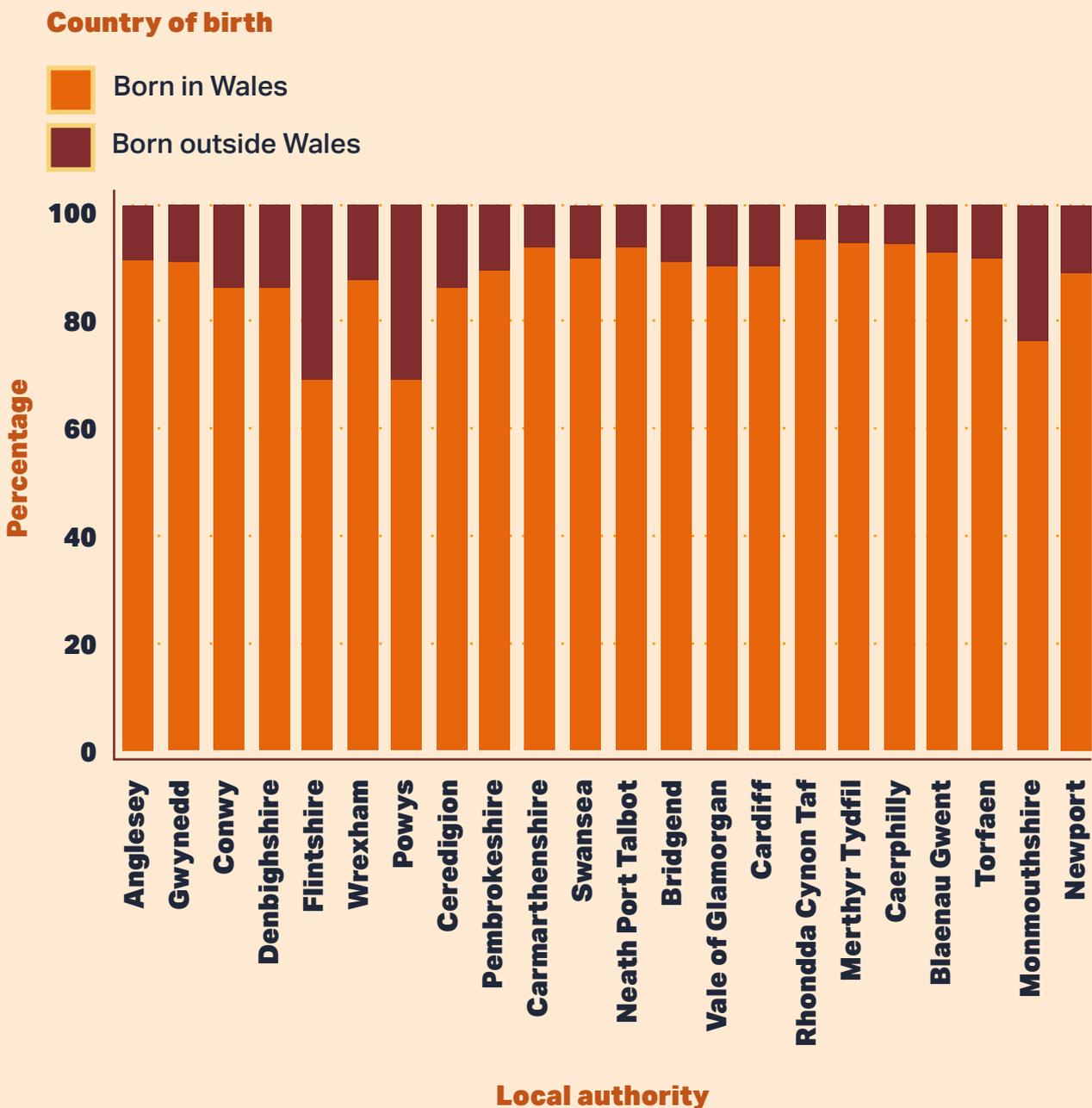


Chart 39: Number of people aged three years or older able to speak Welsh in Wales according to Census 2021, by country of birth



There are some differences as to where those born outside Wales who speak Welsh live by local authority. The highest numbers of Welsh speakers not born in Wales are found in Gwynedd (8,072), Powys (6,326) and Cardiff (5,894). **The relatively high number of speakers in Powys (6,082) and Flintshire (4,809) born in other parts of the UK highlights mobility across the border in these areas and the key role Welsh education plays in the development of Welsh speakers.**

Chart 40: Percentage of Welsh speakers in Wales according to Census 2021, by country of birth and local authority



The population composition of local authorities and the percentages that can speak Welsh vary from local authority to local authority. Looking at the population aged three or over in Gwynedd, the local authority with the highest percentage of Welsh speakers, only 65.8% of the population were born in Wales. This means that **around a third of the population of Gwynedd were born outside Wales**, and of those born outside Wales 20.7% can speak Welsh. **Of the other two-thirds born in Wales, 87% of those can speak Welsh.**

Much like Gwynedd, 65.7% of the aged three or over population of Anglesey were born in Wales, and 75.7% of those people can speak Welsh. Of those born outside Wales, 17.4% can speak the language in Anglesey. Of the population of Ceredigion aged three or over, 53.4% were born in Wales and of those people 72% are able to speak Welsh while 14.6% of those born outside Wales can speak Welsh. **It is significant, of course, that a high percentage of the population of these three local authorities, traditionally considered to be strongholds of the language, were born outside of Wales.**

More of Carmarthenshire's population are born in Wales compared with Gwynedd, Anglesey and Ceredigion. **73.1% of people in Carmarthenshire were born in Wales, but of those only 50.4% can speak Welsh.**

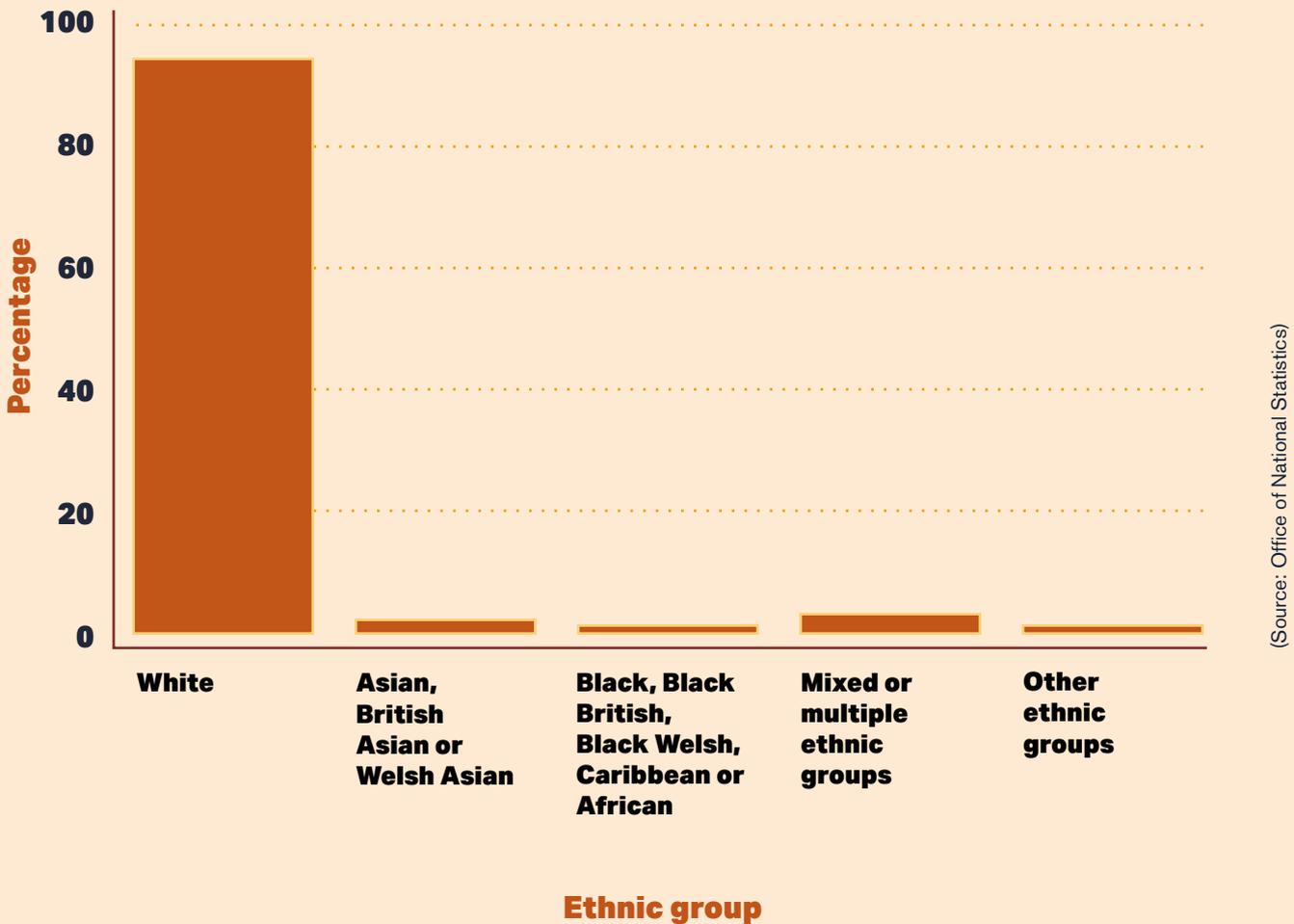
Although Blaenau Gwent and Merthyr Tydfil have the lowest numbers of Welsh speakers, these are two of the authorities with the highest percentages of their population aged three or over born in Wales. In Blaenau Gwent, 87.6% of the people there were born in Wales while the figure is 87% in Merthyr Tydfil. But the percentage of these people who speak Welsh is low, at 6.6% in Blaenau Gwent and 9.6% in Merthyr Tydfil.

Some local authorities in the south-east have the highest percentage of people born in Wales, and also the highest percentage of people who consider themselves to have a Welsh only national identity. But they are also where the lowest numbers of Welsh speakers are to be found. 70% of the population of Merthyr Tydfil and 68% of the population of Blaenau Gwent consider themselves to be exclusively Welsh, compared with 59.3% in Gwynedd and 55.6% in Anglesey.

Migration into Wales from other parts of the UK has long been a familiar pattern and international migration is also becoming increasingly common. **A far smaller proportion of people born outside the UK are Welsh speakers**, only 4.7% of those born in another European country and 3.5% of those born outside Europe (8,709 people in total) are able to speak the language.

10.2 Ethnic group of Welsh speakers

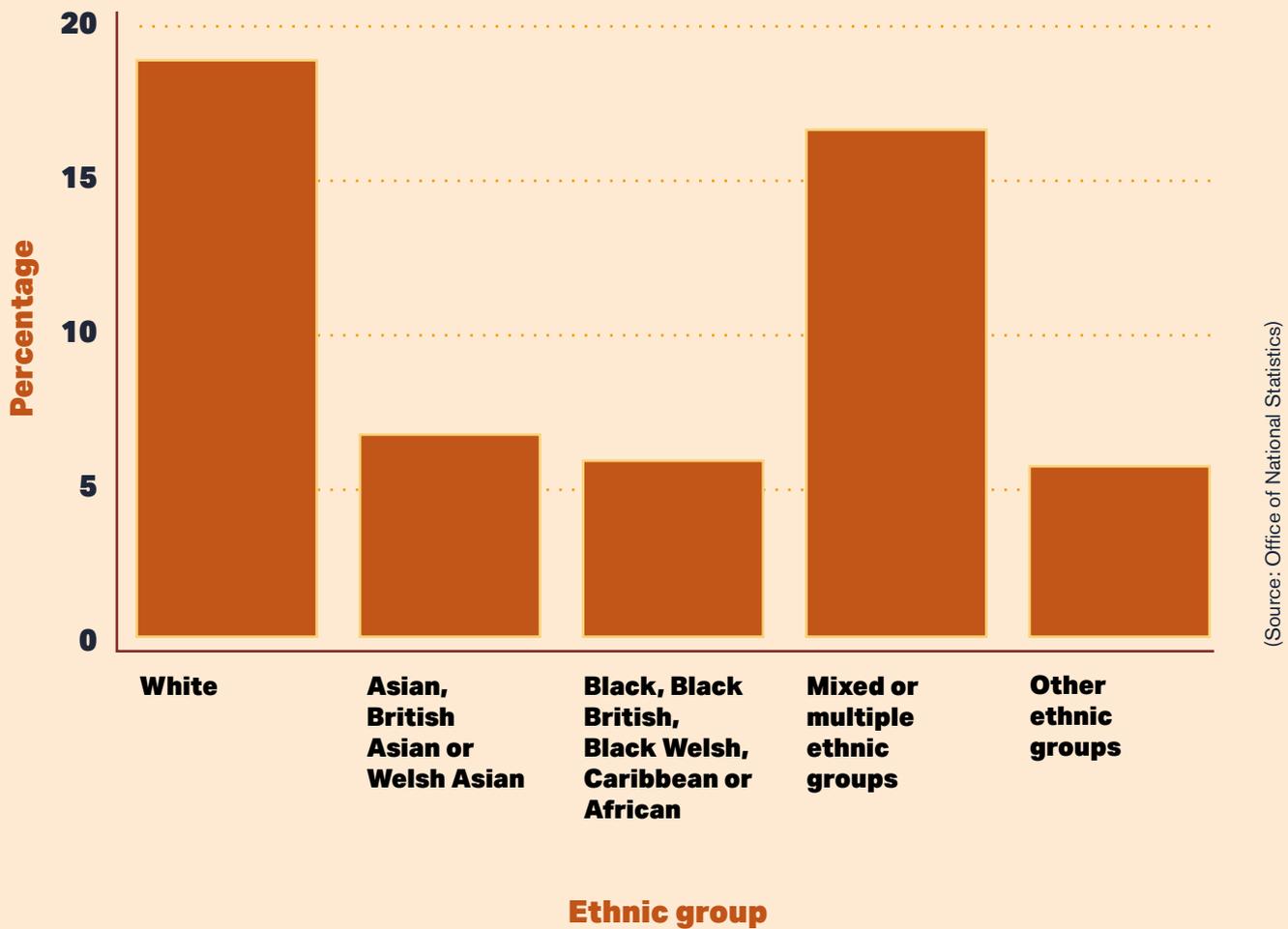
Chart 41: Distribution of Welsh speakers in Wales according to Census 2021, by ethnic group



97% of Welsh speakers are white, 1.4% belong to mixed or multiple ethnic groups, 1% are Asian, Asian British or Asian Welsh, 0.3% are Black, Black British, Black Welsh, Caribbean or African, and a further 0.3% belong to other ethnic groups.

The same categories for ethnic groups were not used in the 2021 and 2011 Census which is a barrier to comparing the figures between the two censuses, but we do know that there has been an increase in the number of Welsh speakers belonging to non-white ethnic groups since 2011 – from almost 11,000 to over 16,000.

Chart 42: Percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by ethnic group



18.4% of the white population of Wales can speak Welsh (522,261 people) and 16.4% of people belonging to mixed or multiple ethnic groups can speak Welsh (7,405 people). The Asian, Asian British or Welsh Asian group follows with 6.4% able to speak Welsh (5,536 people).

10.3 Where do Welsh speakers who do not belong to the white ethnic group live?

Chart 43: Percentage of people aged three years or older able to speak Welsh from ethnic groups (excluding white ethnic groups) and percentage of people aged three years or older able to speak Welsh according to Census 2021, by local authority

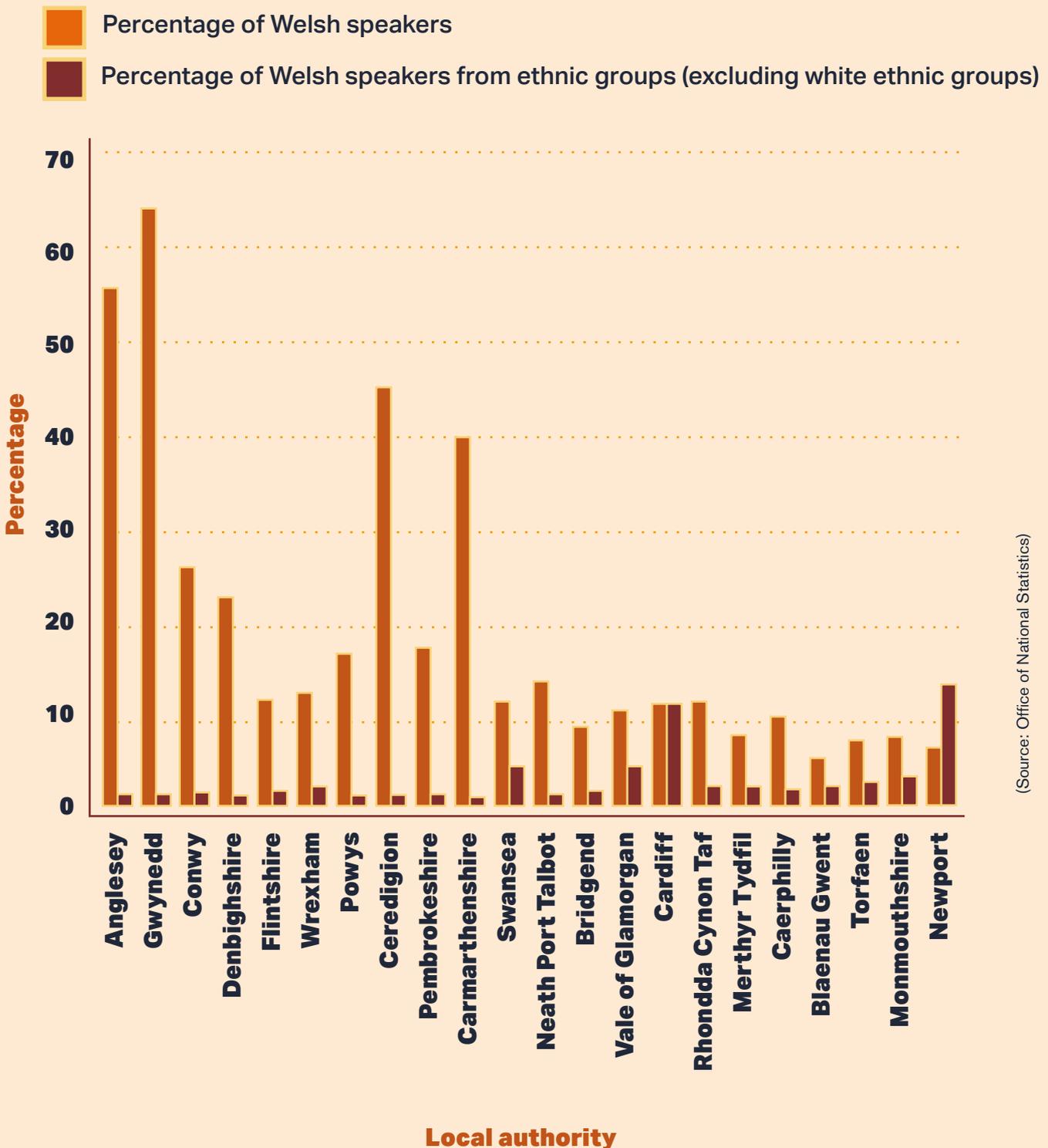
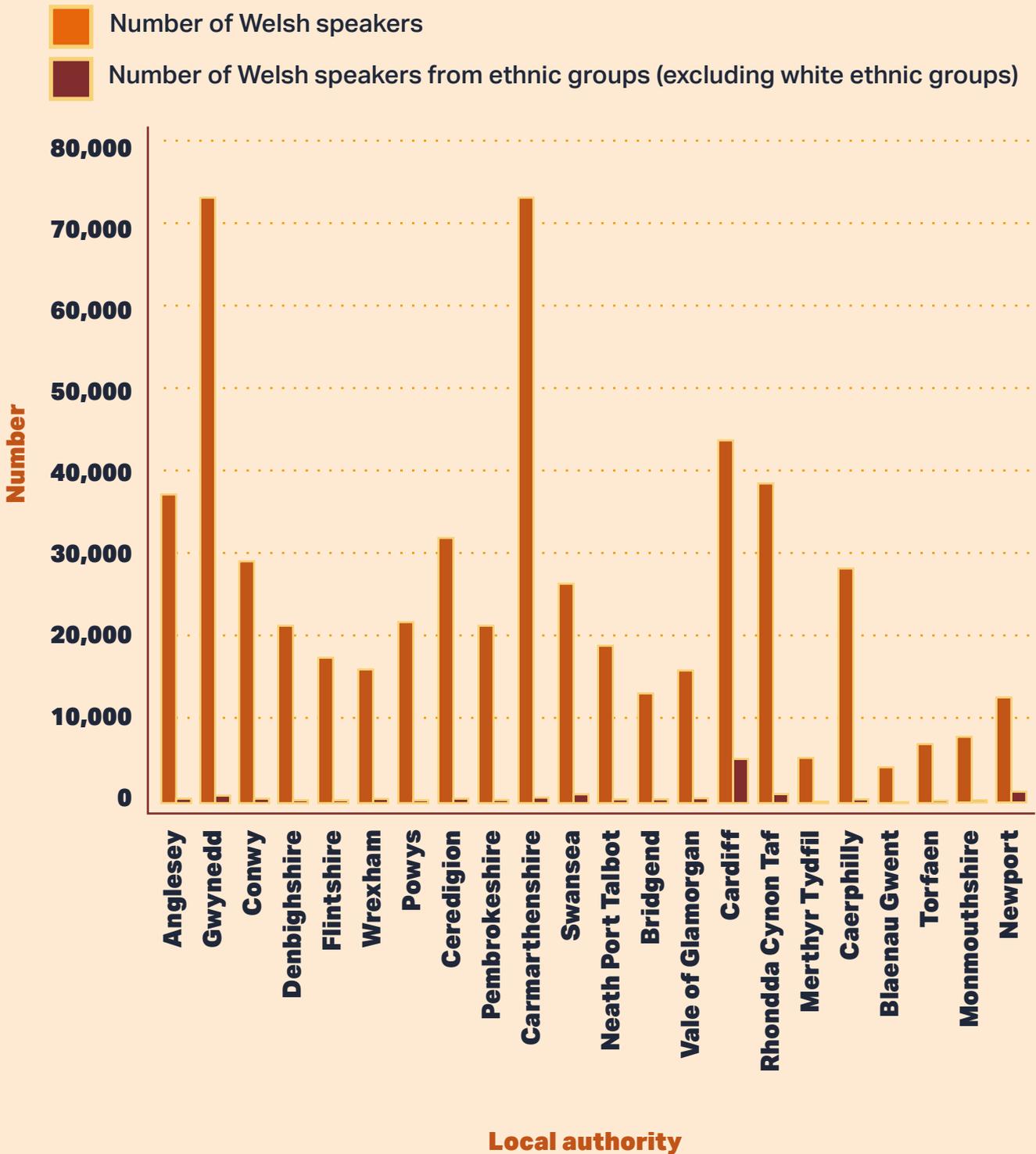


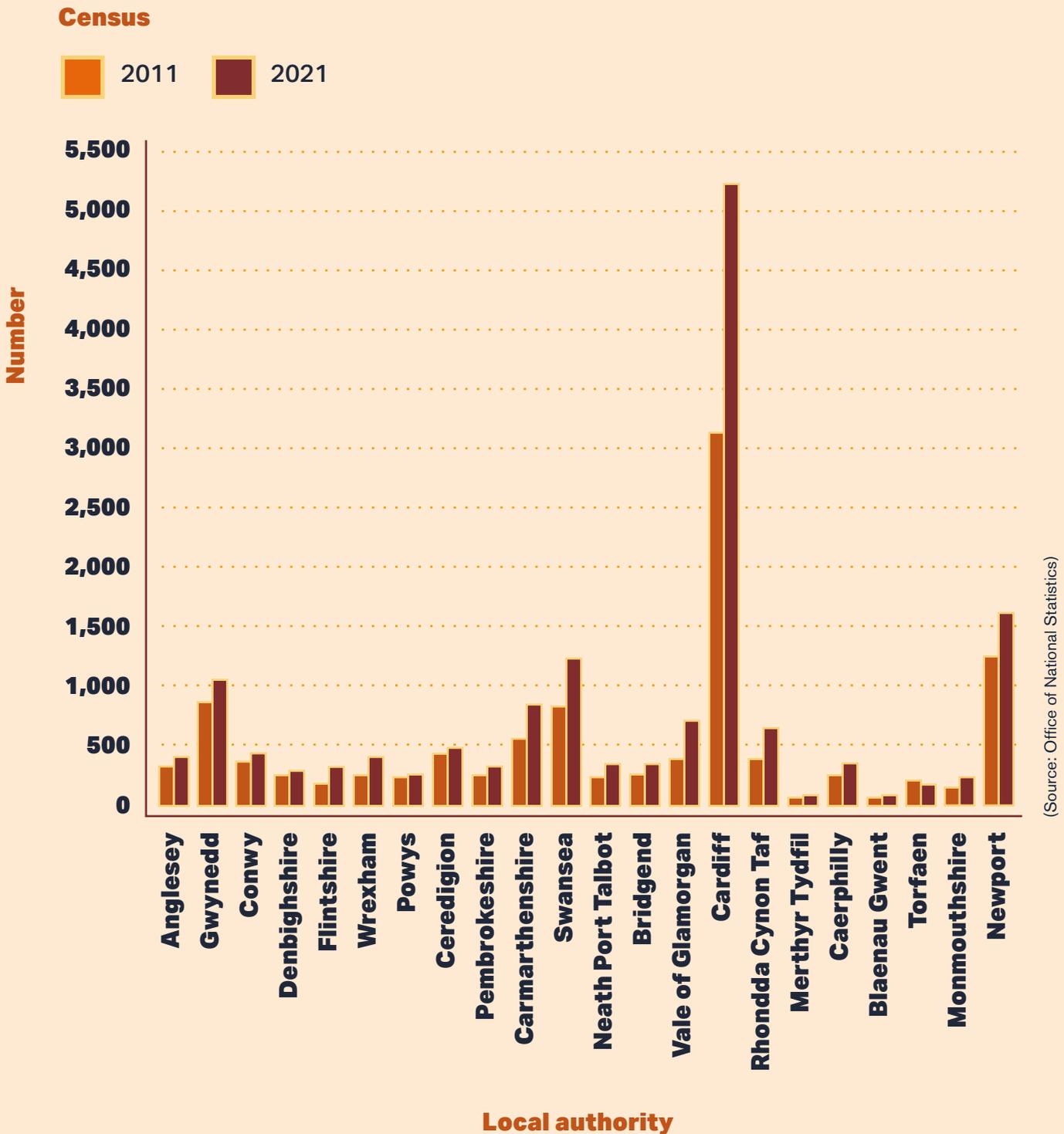
Chart 44: Number of people aged three years or older able to speak Welsh from ethnic groups (excluding white ethnic groups) and number of people aged three years or older able to speak Welsh according to Census 2021, by local authority



(Source: Office of National Statistics)

Chart 43 and 44 illustrate where Welsh speakers who do not belong to the white ethnic group live, with the highest percentages in south-east Wales. In Cardiff, 12% of Welsh speakers belong to ethnic groups other than white, the figure rises to 13.8% in Newport, and 4.9% of Welsh speakers in the Vale of Glamorgan belong to non-white ethnic groups.

Chart 45: Number of people aged three years or older able to speak Welsh from ethnic groups (excluding white ethnic groups), by local authority, 2011–21



Similarly, **the highest numbers of Welsh speakers belonging to these ethnic groups are found in the local authorities of south-east Wales** (with Gwynedd being the notable exception). There are 5,132 living in Cardiff, which is strikingly higher than the rest of the local authorities, with 1,598 in Newport, and 1,217 in Swansea. In Gwynedd, there are 1,049 people from ethnic groups excluding white ethnic groups who can speak Welsh.

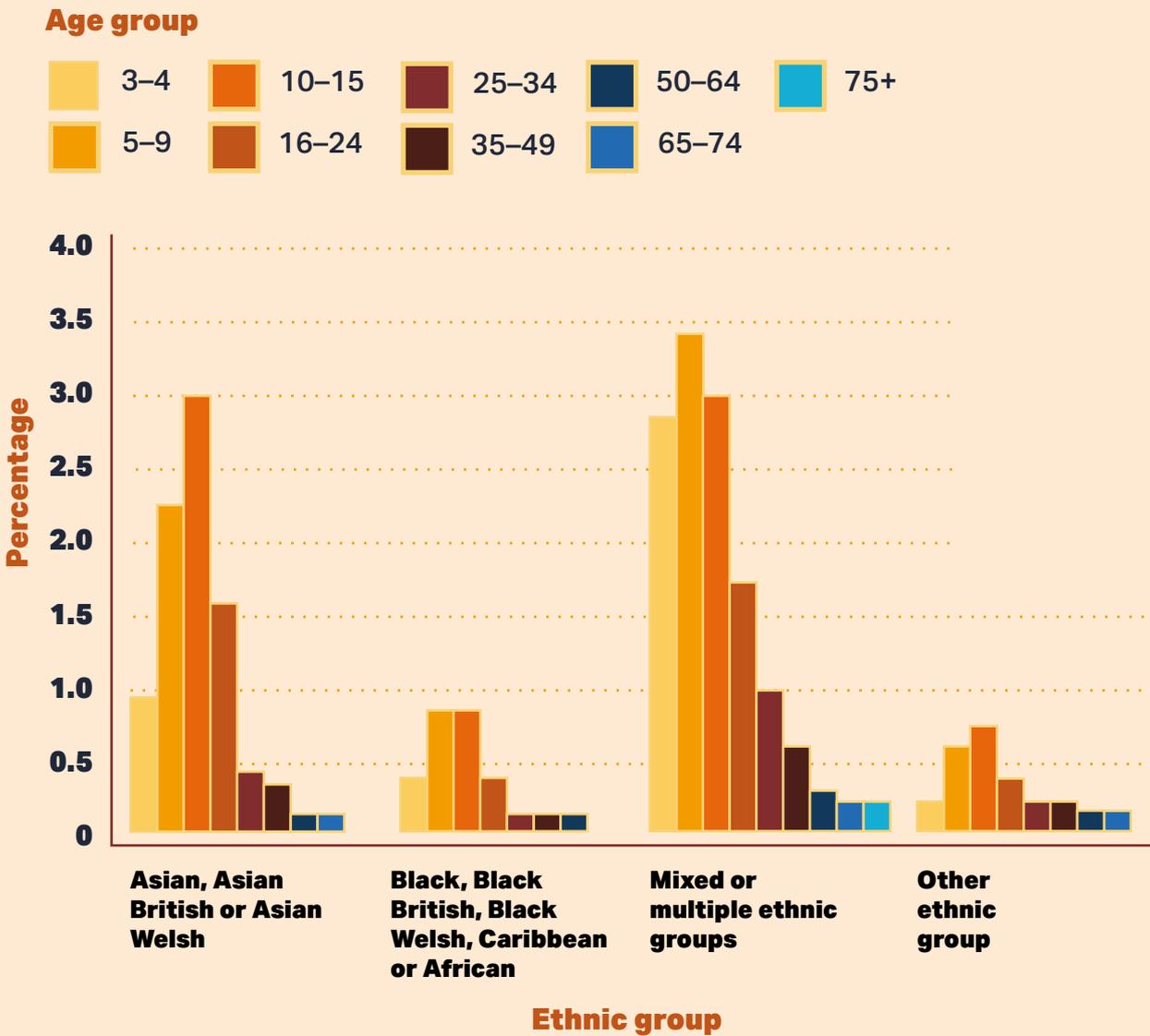
Bringing all non-white ethnic groups together in this way makes it possible to look at patterns across local authorities between 2011 and 2021. Growth in the number of speakers from non-white ethnic groups has been relatively modest during the period with the largest increases seen in Cardiff (2,042 more people), Swansea (399 more people), and Newport (360 more people).

10.4 Age of Welsh speakers belonging to non-white ethnic groups

As with the white ethnic group, **the highest numbers of Welsh speakers in other ethnic groups are found in the 5–15 age category**, and this is true of all ethnic groups. 3.1% of Welsh speakers who are 5–15 years-old are from mixed or multiple ethnic backgrounds. That equates to 4,225 children aged 5 to 15. 2.7% or 3,587 of Welsh speakers who are 5–15 years-old are from Asian, Asian British or Asian Welsh backgrounds.

The percentages and numbers are significantly lower in the older age categories, with the lowest being 23 people over the age of 65 from Black, Black British, Black Welsh, Caribbean or African backgrounds who can speak Welsh.

Chart 46: Percentage of people aged three years or older able to speak Welsh from ethnic groups (excluding white ethnic groups) according to Census 2021, by age group



(Source: Office of National Statistics)

The Commissioner's conclusions



In Gwynedd, Anglesey and Ceredigion, a high proportion of those born in Wales can speak Welsh and therefore, **in order to increase the numbers of speakers in these three local authorities, it may be necessary to focus efforts to increase the numbers of those moving to these areas from beyond the border who can speak Welsh,** alongside maintaining the percentages of speakers born in Wales.

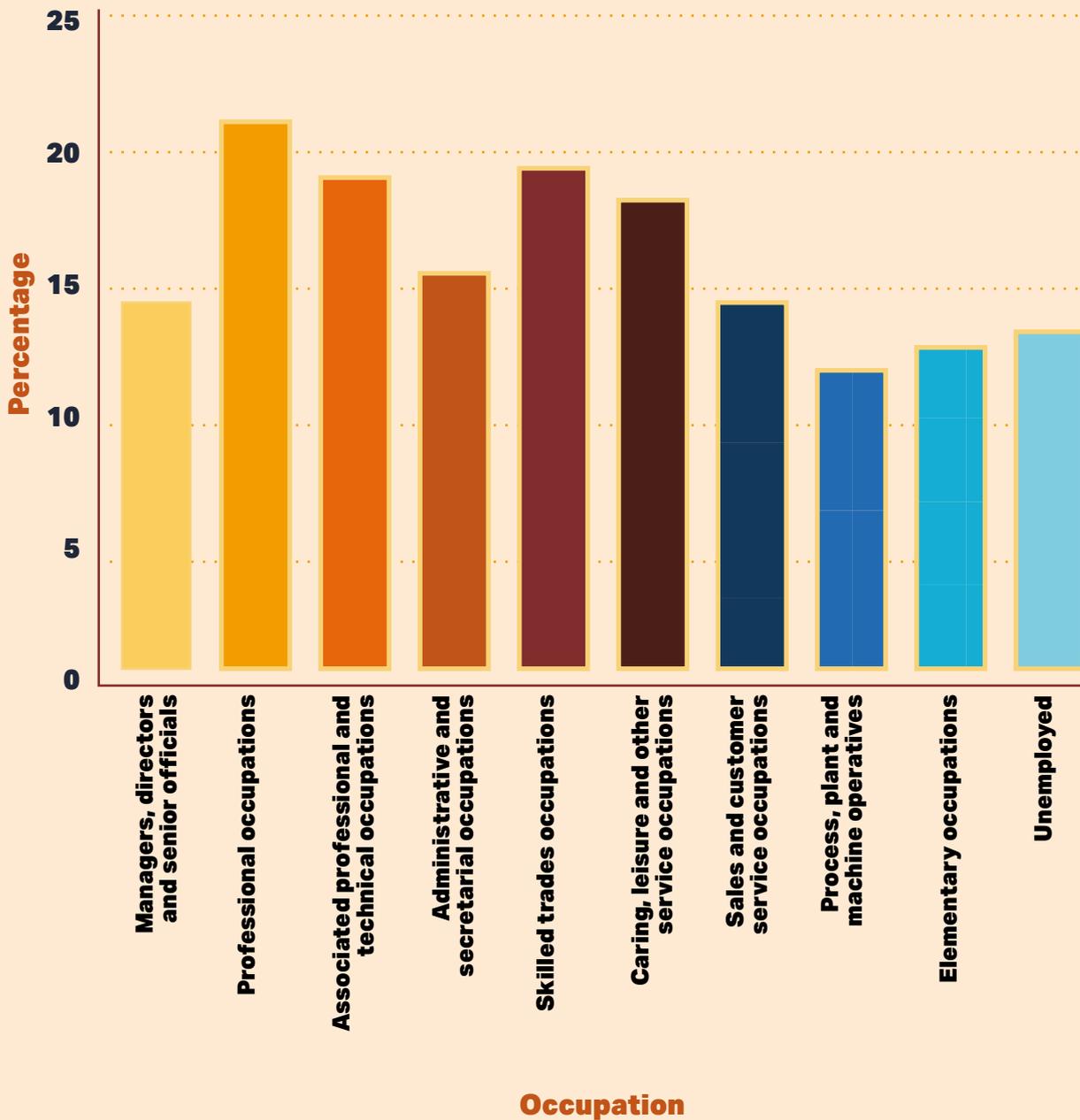
The situation is slightly different in other parts of the country, in Carmarthenshire and in the south-east Wales valleys for example, where much higher percentages are born in Wales and consequently higher percentages identify solely as Welsh. Yet many of those born in Wales in these areas report that they do not speak Welsh, and the deep Welsh identity that belongs to the south-east areas in particular does not translate into linguistic ability. **It is therefore not interventions to encourage assimilation into Welsh and Welsh-speaking communities that are needed here, of course, but rather opportunities to learn and take pride in using the official language of the country in which many of them were born.**

A very low percentage of Welsh speakers are from non-white ethnic backgrounds, but the highest percentages are in the local authorities of south-east Wales and there are more Welsh speakers from non-white ethnic groups in the 5–15 age group. **Ensuring that opportunities to learn Welsh are available to people from all ethnic backgrounds and promoting the fact that the Welsh language belongs to everyone, will be essential for supporting future growth in speaker numbers.**

11. Where do Welsh speakers work?

11.1 Occupation of Welsh speakers

Chart 47: Percentage of people aged 16 and over in employment in the week before the Census who can speak Welsh in Wales according to Census 2021, by occupation



(Source: Office of National Statistics)

Table 30: Number and percentage of people aged 16 years and over able to speak Welsh in Wales according to Census 2021, by occupation

Occupation	Number	Can speak Welsh	
		Number	Percentage
Managers, directors and senior officials	143,938	21,228	14.7
Professional occupations	249,466	52,283	21.0
Associated professional and technical occupations	161,273	30,248	18.8
Administrative and secretarial occupations	128,116	19,979	15.6
Skilled trades occupations	166,613	31,761	19.1
Caring, leisure and other service occupations	153,029	27,582	18.0
Sales and customer service occupations	114,559	16,708	14.6
Process, plant and machine operatives	107,475	12,723	11.8
Elementary occupations	143,982	18,884	13.1
Unemployed	1,190,965	160,280	13.5

(Source: Office of National Statistics)

59% of Welsh speakers 16 years and over are currently in work, which equates to 231,400 people. This figure excludes retired people and students unless they indicated that they were employed. **Looking at the working population as a whole, there has been an increase in the number and percentage of Welsh speakers** since 2011 and by today 16.9% can speak Welsh, which is a slight increase since 2011. That aligns with the modest increase in the number of speakers aged 25 to 44 over the same period.

The Office for National Statistics classifies occupations by the level of qualification, training and experience required. **It is in professional occupations that the highest proportion of the workforce can speak Welsh (21%)**, these are usually jobs at a level where a university degree or equivalent qualification is required. 19.1% of the people working in skilled trades occupations can speak Welsh, which are usually jobs where someone has trained for a period at work. And 18.8% of the people who work in associate professional and technical occupations can speak the language, these are usually jobs where a high-level vocational qualification and structured training are required.

Chart 48: Distribution of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority in north Wales, by occupation

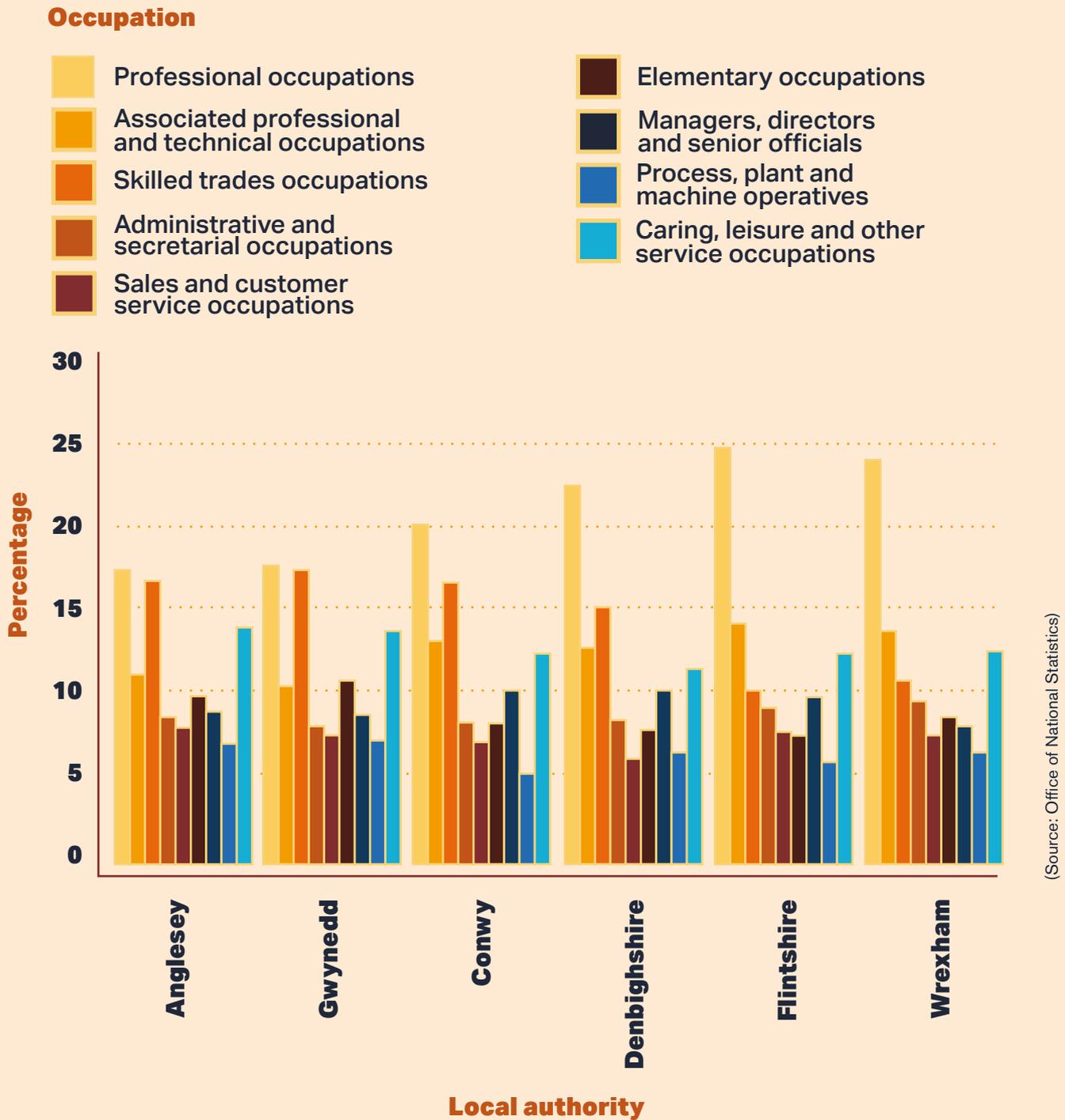


Chart 49: Distribution of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority in south-west and mid Wales, by occupation

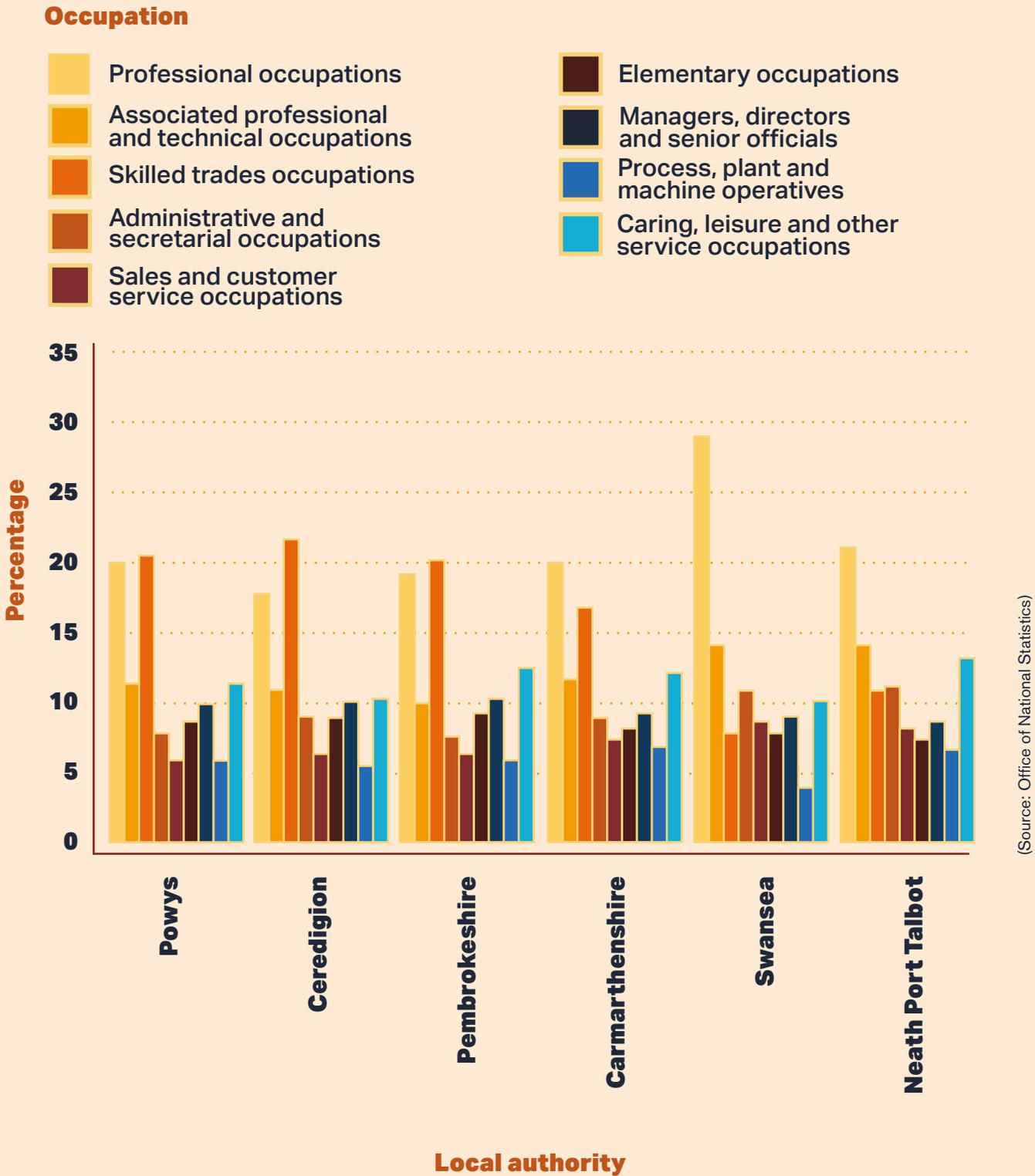


Chart 50: Distribution of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority in central south Wales, by occupation

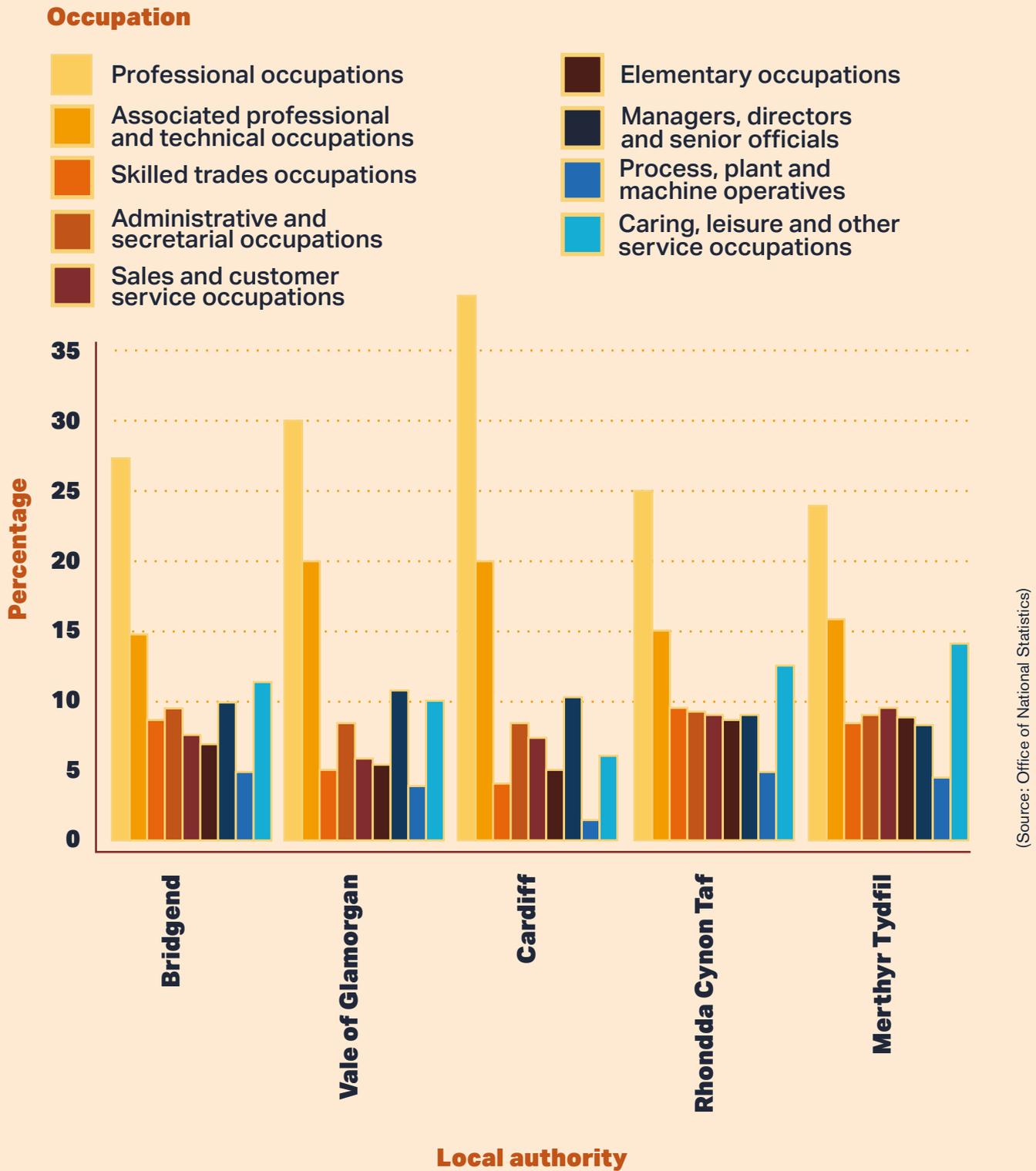
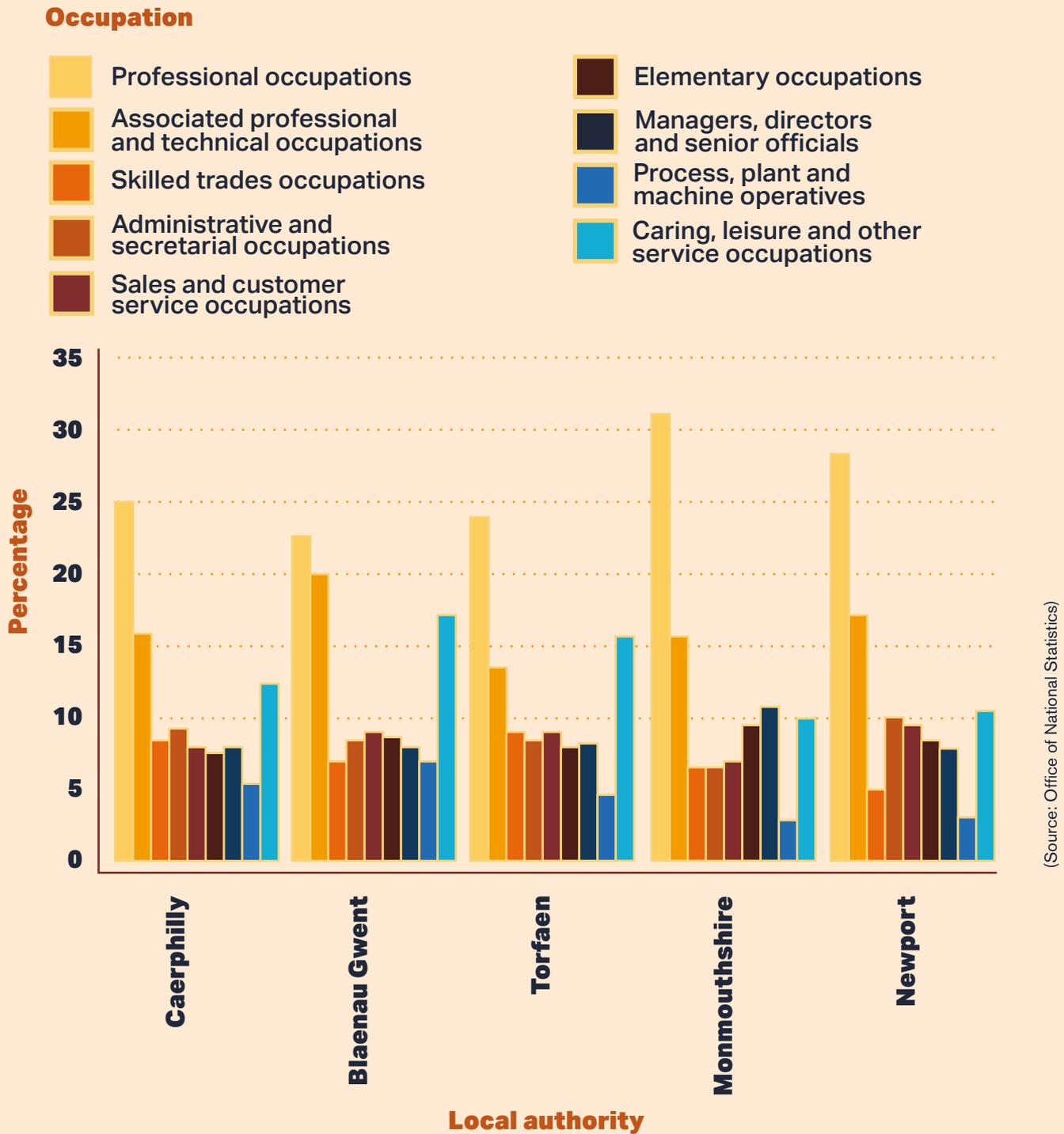


Chart 51: Distribution of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority in south-east Wales, by occupation



When examining occupations at local authority level and considering working Welsh speakers only, the percentage of Welsh speakers working in professional occupations is significantly higher than any other occupation in the north-east and south-east local authorities. **In the west and mid-Wales local authorities, the percentages of Welsh speakers working in professional occupations are still higher than most other occupations, but an equally high percentage are working in skilled trades occupations.** Indeed, there are slightly more working in the skilled trades in the rural local authorities of Powys, Ceredigion and Pembrokeshire than there are in professional occupations.

By contrast, **the capital city has the highest percentage of Welsh speakers working in professional occupations.** 38.6% of Cardiff's working Welsh speakers work in professional occupations, while 19.7% work in associate professional and technical occupations. This 38.6% in the professional occupations is more than double the percentage found in Gwynedd and Anglesey, for example, and **Cardiff also has the highest number of speakers in the professional occupations** (7,038).

A change can be seen in the percentage and number of speakers in different occupations between 2011 and 2021. There has been an increase in all local authorities in the percentage of working Welsh speakers who work in the professional and associate professional and technical occupations, and those working as managers, directors and senior officials. And the biggest increases in these categories are concentrated, overall, in the south-east.

There has also been an increase in all local authorities in the number of Welsh speakers working in the professional and associate professional and technical occupations. The number of Welsh speakers working in skilled trades decreased in the north, mid and south-west local authorities, while there was a slight increase in the south-east local authorities.

Chart 52: Change in the percentage of Welsh speakers aged 16 and over in work the week leading up to the 2011 and 2021 Census, by occupation and local authority (percentage point change)

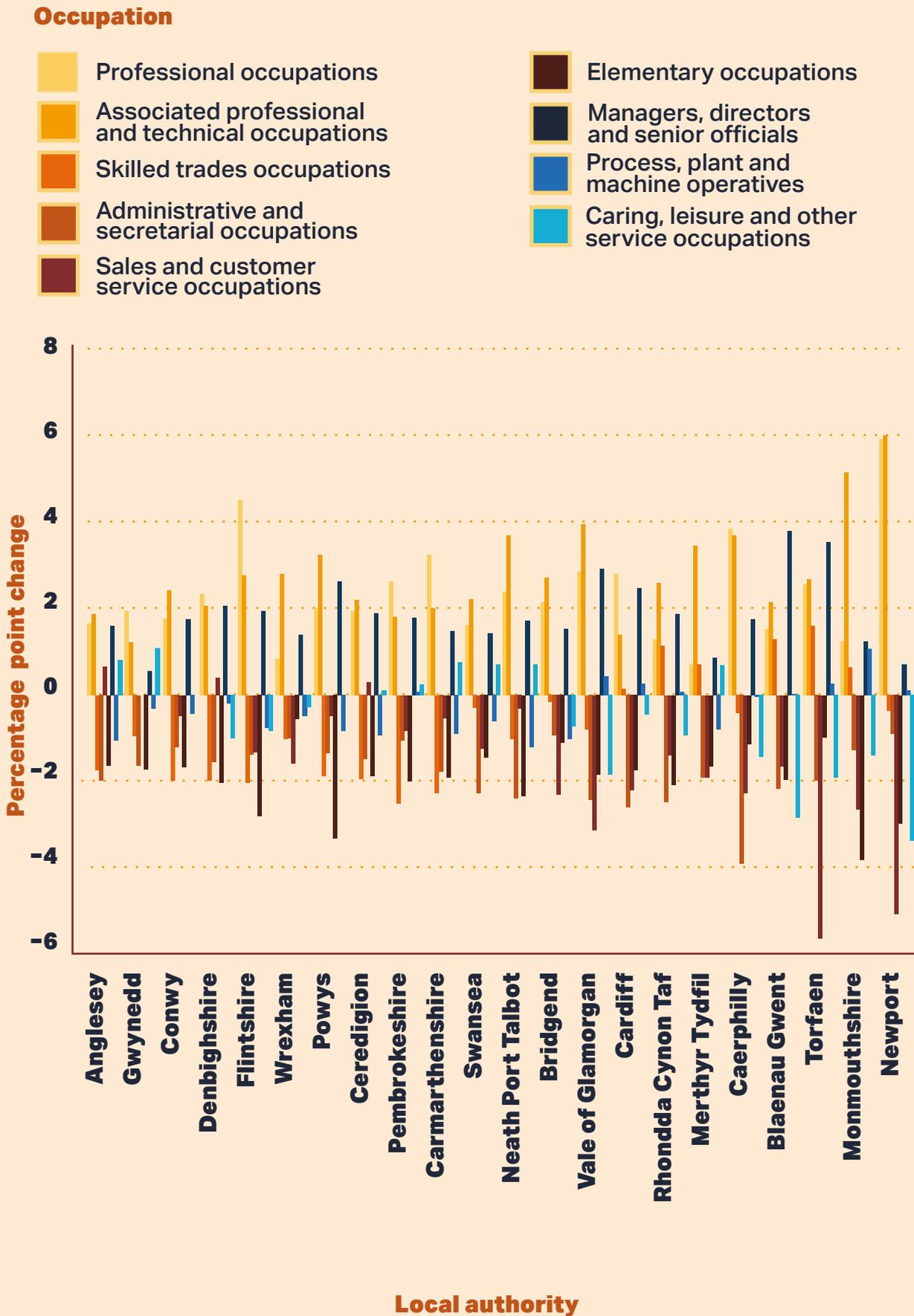
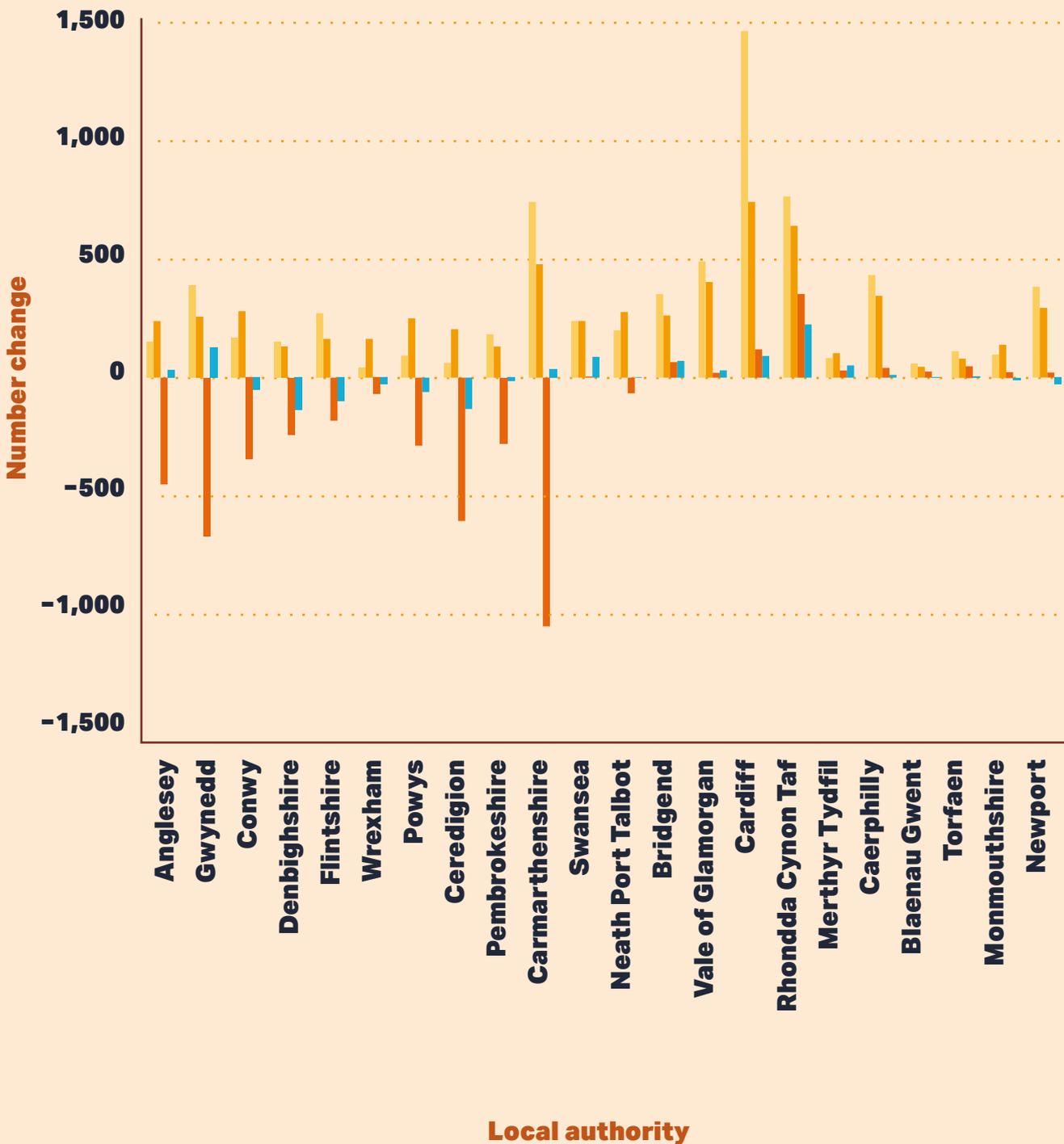


Chart 53: Change in the number of Welsh speakers aged 16 and over in work the week preceding the 2011 and 2021 Census, by occupation and local authority

Occupation

- Professional occupations
- Associated professional and technical occupations
- Skilled trades occupations
- Caring, leisure and other service occupations



(Source: Office of National Statistics)

11.2 Industry

Chart 54: Distribution of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority in north Wales, by industry

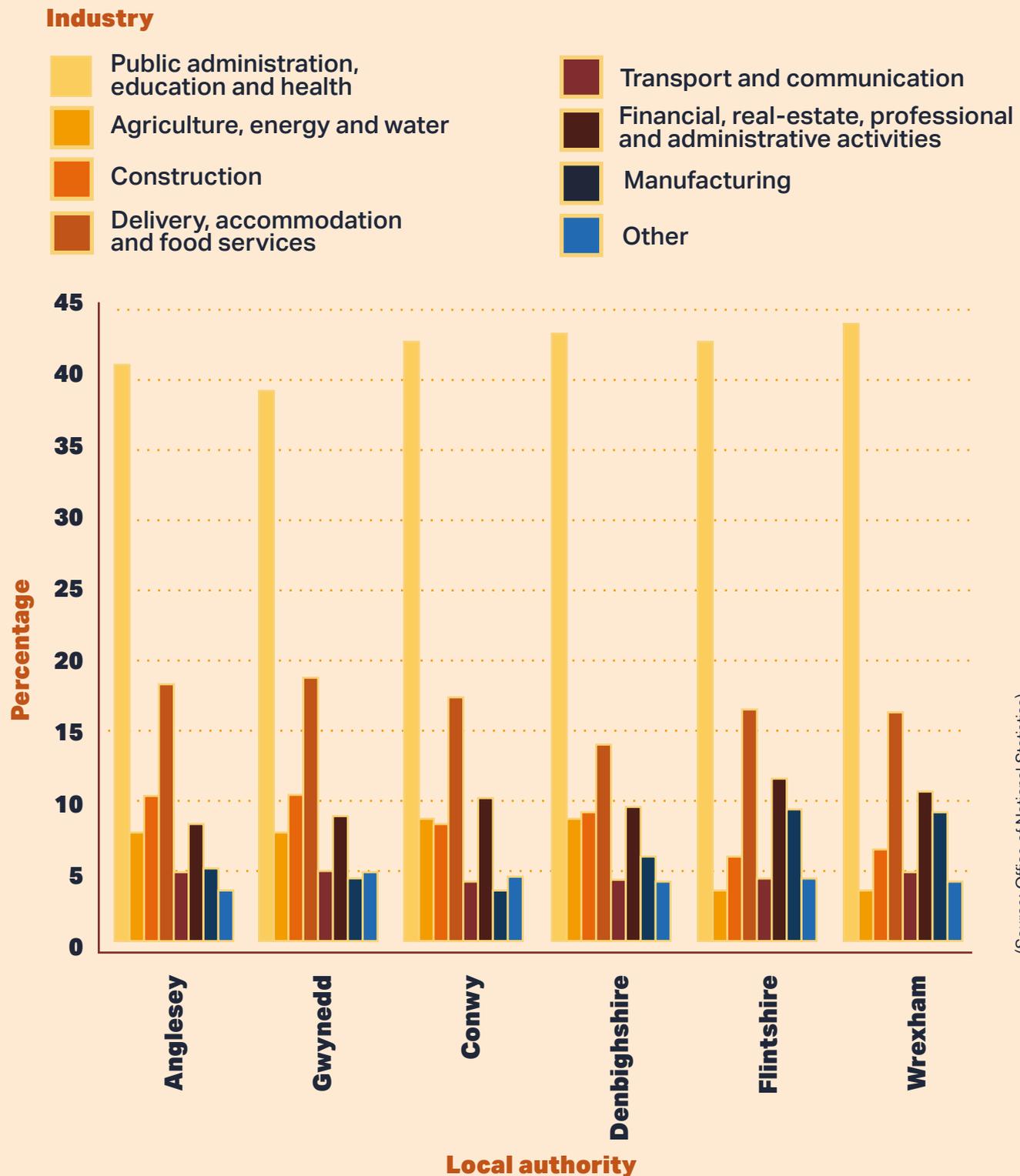


Chart 55: Distribution of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority in south-west and mid Wales, by industry

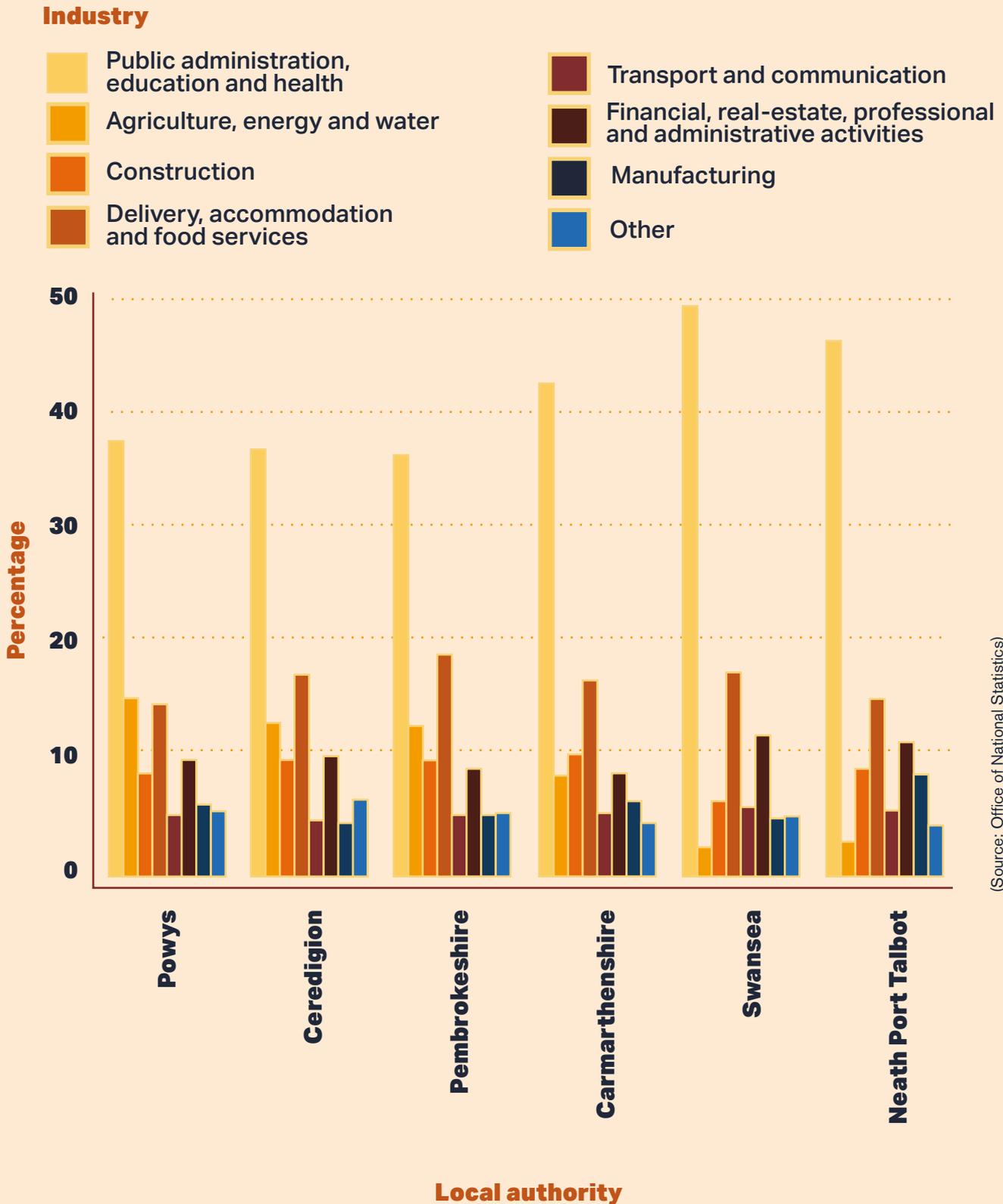


Chart 56: Distribution of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority in central south Wales, by industry

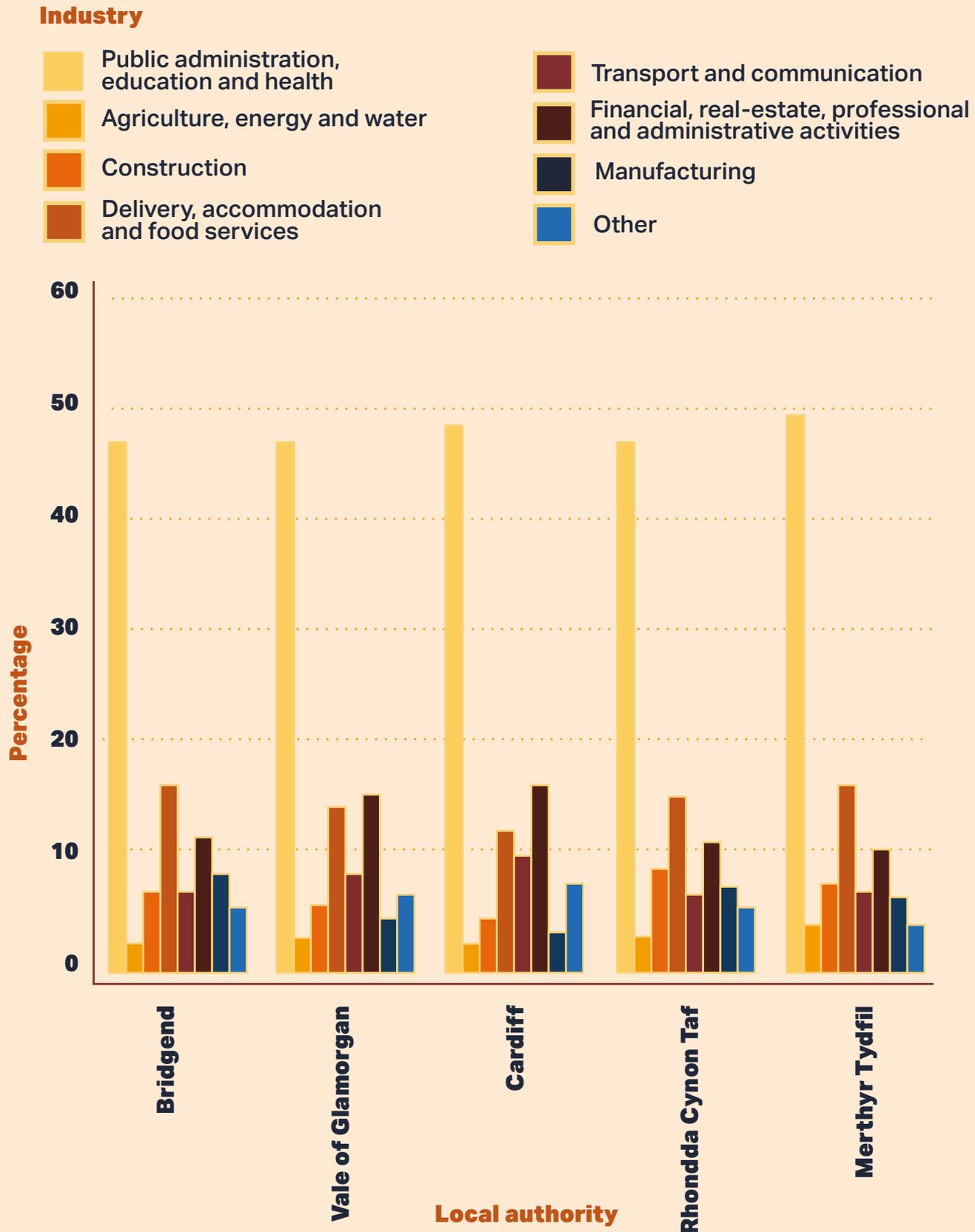
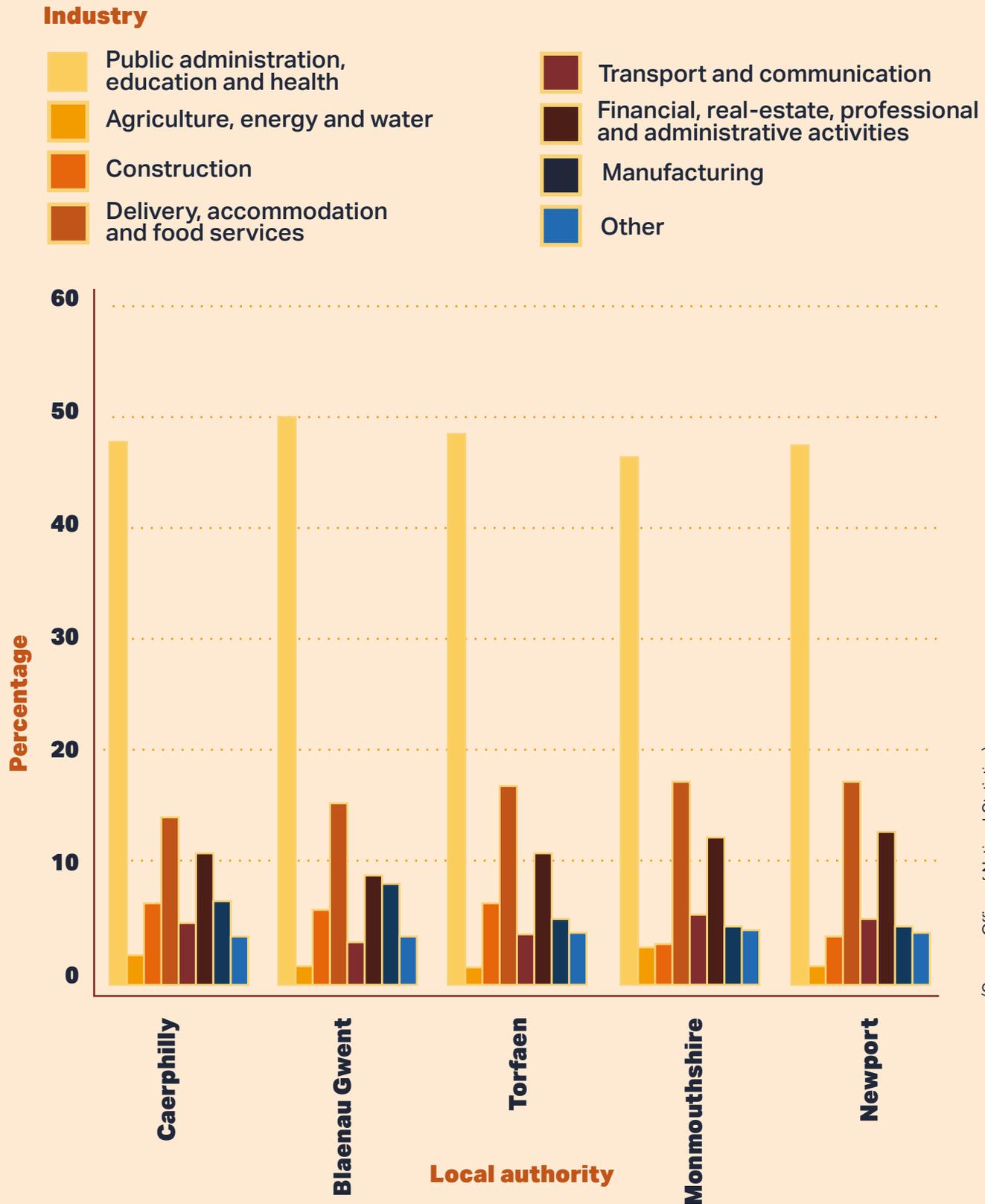


Chart 57: Distribution of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority in south-east Wales, by industry

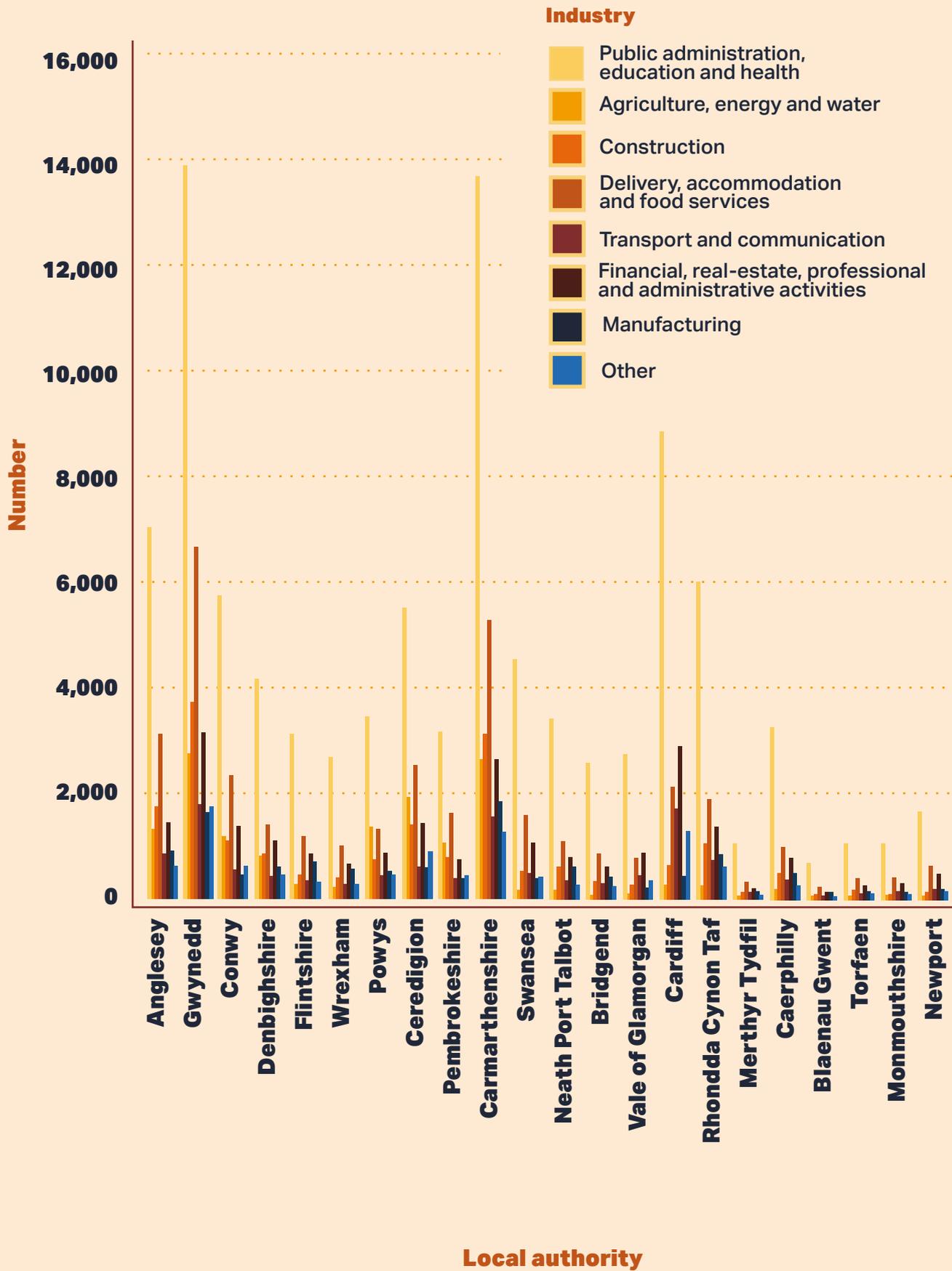


The largest proportion of Welsh speakers are employed in public administration, education and health, and that pattern is consistent across all local authorities. Around half of the working Welsh speakers in Blaenau Gwent, Merthyr Tydfil and Swansea work in one of these areas, for example. The highest numbers working in these industries, on the other hand, are found in Gwynedd (13,874) and Carmarthenshire (13,661).

Looking at the industries themselves rather than the distribution of Welsh speakers, **the agriculture, energy and water industry has the highest percentage of workers who can speak Welsh with 30% of the workforce able to speak the language**. The percentage of the workforce able to speak Welsh in this sector is as high as 84% in Gwynedd, 73.4% in Anglesey, and 70.8% in Ceredigion.

The sector with the second highest proportion of Welsh-speaking workers is education where 27.3% are able to speak Welsh. The lowest percentage is found in manufacturing, where 10.4% of the workforce can speak Welsh. But despite this low national figure, over half of the manufacturing workforce can speak Welsh in Gwynedd and Anglesey.

Chart 58: Number of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority and industry



(Source: Office of National Statistics)

The Commissioner's conclusions



The largest proportion of Welsh speakers work in professional occupations. It can be assumed that these are the types of jobs found in organisations that have duties to comply with Welsh language standards and therefore there is opportunity to take advantage of the language skills of Welsh speakers in these types of jobs.

It is also significant that the largest proportion of Welsh speakers work in health and education and **there is a need to ensure that Welsh speakers use their language skills in these fields as there is a demand for more teachers and health professionals who can speak Welsh.**

When dealing with specific sectors, it is important to remember that a high percentage of agriculture, energy and water workers, and education workers speak Welsh. **It is therefore necessary to emphasise the importance of providing Welsh language resources, training and services to the workforce in these sectors, and recognise the contribution that Welsh speakers in these sectors make to the vitality of the Welsh language, especially in rural communities.**

The fact that fewer Welsh speakers work in certain sectors or fields does not mean that the language skills of those people should be overlooked. **It is important to look at each local authority individually to find out where Welsh speakers work and encourage everyone to use their language skills in the workplace.** Although the manufacturing sector has the lowest percentage of speakers nationally, the percentage is high in Gwynedd and Anglesey for example, and this should be borne in mind when providing for the sector in those areas in particular.

APPENDIX

Additional tables

Table 3: Number and percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by local authority

Local authority	Total usual residents aged 3 and over	Can speak Welsh	
		Number	Percentage
Anglesey	67,085	37,413	55.8
Gwynedd	114,307	73,560	64.3
Conwy	111,805	29,000	25.9
Denbighshire	93,059	20,946	22.5
Flintshire	150,556	17,428	11.6
Wrexham	131,080	15,953	12.2
Powys	129,907	21,358	16.4
Ceredigion	69,917	31,678	45.3
Pembrokeshire	120,203	20,626	17.2
Carmarthenshire	182,718	72,838	39.9
Swansea	231,888	25,986	11.2
Neath Port Talbot	138,322	18,662	13.5
Bridgend	141,306	13,037	9.2
Vale of Glamorgan	128,088	14,737	11.5
Cardiff	351,244	42,757	12.2
Rhondda Cynon Taf	230,325	28,556	12.4
Merthyr Tydfil	56,957	5,079	8.9
Caerphilly	170,683	17,837	10.4
Blaenau Gwent	64,793	4,035	6.2
Torfaen	89,367	7,366	8.2
Monmouthshire	90,690	7,852	8.7
Newport	153,872	11,594	7.5

(Source: Office of National Statistics)

Table 5: Change in the percentage of people aged three years or older able to speak Welsh in Wales by local authority (percentage point change), 1981–2021

Local authority	Percentage point change				1981–2021
	1981–1991	1991–2001	2001–2011	2011–2021	
Anglesey	1.0	-1.9	-2.9	-1.4	-5.2
Gwynedd	-1.7	-3.1	-3.6	-1.0	-9.4
Conwy	-1.0	-1.2	-2.0	-1.5	-5.7
Denbighshire	-1.3	-0.5	-1.8	-2.1	-5.7
Flintshire	0.8	0.9	-1.2	-1.6	-1.1
Wrexham	-0.9	0.8	-1.7	-0.7	-2.5
Powys	0.0	0.4	-2.5	-2.2	-4.3
Ceredigion	-4.1	-7.1	-4.7	-2.0	-17.9
Pembrokeshire	0.3	3.5	-2.6	-2.0	-0.8
Carmarthenshire	-4.2	-4.5	-6.4	-4.0	-19.1
Swansea	-1.4	0.1	-2.0	-0.2	-3.5
Neath Port Talbot	-1.2	0.1	-2.7	-1.8	-5.6
Bridgend	0.1	2.5	-1.1	-0.5	1.0
Vale of Glamorgan	0.9	4.5	-0.5	0.7	5.6
Cardiff	0.7	4.4	0.1	1.1	6.3
Rhondda Cynon Taf	-0.1	3.5	-0.2	0.1	3.3
Merthyr Tydfil	-0.9	2.7	-1.3	0.0	0.5
Caerphilly	0.7	5.2	0.0	-0.8	5.1
Blaenau Gwent	0.0	7.3	-1.7	-1.6	4.0
Torfaen	-0.1	8.7	-1.3	-1.6	5.7
Monmouthshire	-0.6	7.1	0.6	-1.2	5.9
Newport	-0.1	8.7	-0.7	-1.8	5.1

Table 6: Change in the number of people aged three years or older able to speak Welsh in Wales, by local authority (person change), 1981–2021

Local authority	Person change				1981–2021
	1981–1991	1991–2001	2001–2011	2011–2021	
Anglesey	1,918	-2,353	-325	-1,155	-1,915
Gwynedd	170	-873	-846	-3,440	-4,989
Conwy	888	-150	-698	-1,600	-1,560
Denbighshire	-396	890	-1,524	-1,290	-2,320
Flintshire	1,739	2,196	-1,256	-1,915	764
Wrexham	-466	1,745	-1,446	-706	-873
Powys	1,297	2,044	-1,824	-2,632	-1,115
Ceredigion	863	1,898	-2,954	-3,286	-3,479
Pembrokeshire	875	4,238	-1,181	-2,160	1,772
Carmarthenshire	-4,056	-5,010	-6,148	-5,210	-20,424
Swansea	-3,496	348	-2,606	-346	-6,100
Neath Port Talbot	-2,208	-358	-2,706	-2,036	-7,308
Bridgend	209	3,115	-294	-66	2,964
Vale of Glamorgan	1,264	5,320	195	1,548	8,327
Cardiff	2,358	14,433	4,231	6,022	27,044
Rhondda Cynon Taf	-671	7,911	-167	777	7,850
Merthyr Tydfil	-669	1,307	-504	51	185
Caerphilly	1,196	8,504	1,014	-1,414	9,300
Blaenau Gwent	-86	4,878	-1,133	-1,249	2,410
Torfaen	-50	7,661	-1,139	-1,275	5,197
Monmouthshire	-371	6,022	1,092	-928	5,815
Newport	-161	10,258	-133	-1,408	8,556

Table 9: Number and percentage of people aged three years or older able to speak Welsh in Wales by age group, 1981–2021

Age group	Can speak Welsh									
	Number					Percentage				
	1981	1991	2001	2011	2021	1981	1991	2001	2011	2021
3–4	8,326	12,160	13,239	16,495	11,947	13.3	16.2	18.8	23.3	18.2
5–15	82,713	101,076	171,168	152,255	134,673	18.3	25.9	40.8	40.3	34.3
16–24	55,353	59,539	70,060	80,909	73,738	15.0	17.1	22.2	21.6	22.4
25–44	109,800	113,265	116,715	113,484	118,848	15.6	14.5	15.1	15.0	16.0
45–64	131,414	111,165	112,742	107,941	107,345	20.7	17.4	15.6	13.3	13.0
65+	115,926	110,893	98,444	90,932	91,745	27.4	22.6	19.5	16.2	13.9

Table 12: Percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by local authority and age group

Local authority	Can speak Welsh					
	Percentage					
	3–4	5–15	16–24	25–44	45–64	65+
Anglesey	53.3	75.6	68.9	60.5	49.2	45.8
Gwynedd	71.0	88.6	60.2	68.2	60.2	54.7
Conwy	23.2	43.8	36.7	27.2	21.1	19.4
Denbighshire	23.2	37.3	28.5	21.6	18.1	18.4
Flintshire	10.7	27.4	17.2	9.8	7.8	6.7
Wrexham	11.6	27.6	17.4	10.2	6.9	9.1
Powys	17.5	35.5	24.0	15.4	12.0	11.8
Ceredigion	52.2	74.9	37.9	48.3	40.6	39.9
Pembrokeshire	18.0	34.0	24.2	15.6	12.2	13.3
Carmarthenshire	38.3	57.9	45.6	36.0	32.9	40.1
Swansea	11.0	25.8	13.7	8.6	6.6	9.8
Neath Port Talbot	13.6	25.8	17.2	12.2	8.9	11.6
Bridgend	9.0	20.4	14.6	9.4	5.5	4.7
Vale of Glamorgan	15.1	29.2	18.1	10.5	6.6	4.9
Cardiff	13.4	28.4	13.9	10.6	7.5	5.8
Rhondda Cynon Taf	15.9	27.0	20.4	13.9	6.3	4.2
Merthyr Tydfil	8.8	21.7	15.5	9.1	4.0	3.2
Caerphilly	13.0	28.5	18.8	10.1	4.6	2.6
Blaenau Gwent	6.0	20.4	14.0	5.3	2.0	1.2
Torfaen	9.8	28.2	16.1	6.1	2.5	1.8
Monmouthshire	11.6	33.1	17.9	5.5	3.6	2.9
Newport	7.1	25.2	13.9	4.6	2.4	1.7

Table 13: Number of people aged three years or older able to speak Welsh in Wales according to Census 2021, by local authority and age group

Local authority	Can speak Welsh					
	Number					
	3–4	5–15	16–24	25–44	45–64	65+
Anglesey	757	6,445	3,976	8,428	9,468	8,340
Gwynedd	1,605	12,474	8,588	17,002	18,975	14,918
Conwy	485	5,848	3,416	6,330	6,836	6,085
Denbighshire	467	4,527	2,430	4,334	4,820	4,368
Flintshire	344	5,414	2,386	3,638	3,411	2,235
Wrexham	344	4,928	2,210	3,424	2,551	2,497
Powys	430	5,288	2,585	4,015	4,645	4,397
Ceredigion	598	5,525	3,977	6,541	7,694	7,343
Pembrokeshire	438	5,179	2,543	3,977	4,179	4,310
Carmarthenshire	1,486	13,518	7,586	14,881	17,124	18,243
Swansea	530	7,527	4,246	4,930	3,986	4,768
Neath Port Talbot	417	4,653	2,548	4,173	3,372	3,499
Bridgend	284	3,798	1,961	3,404	2,180	1,410
Vale of Glamorgan	451	5,143	2,088	3,305	2,341	1,407
Cardiff	1,076	13,332	8,373	10,937	6,018	3,022
Rhondda Cynon Taf	826	8,430	5,094	8,272	3,967	1,967
Merthyr Tydfil	125	1,705	885	1,384	624	356
Caerphilly	513	6,616	3,128	4,453	2,201	929
Blaenau Gwent	86	1,676	860	883	366	164
Torfaen	207	3,433	1,367	1,411	611	336
Monmouthshire	196	3,559	1,339	1,063	1,000	693
Newport	284	5,655	2,157	2,063	978	457

Table 14: Change in the percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by age group and local authority (percentage point change), 2011–21

Local authority	Can speak Welsh					
	Percentage point change					
	3–4	5–15	16–24	25–44	45–64	65+
Anglesey	-0.8	-4.5	1.7	2.1	-0.7	-3.7
Gwynedd	-2.0	-3.7	1.6	-0.3	0.8	-3.3
Conwy	-8.5	-5.4	3.2	-0.1	0.4	-2.8
Denbighshire	-4.4	-8.6	2.2	-0.6	-0.4	-3.0
Flintshire	-3.7	-8.6	0.5	-0.3	0.5	-1.3
Wrexham	-3.8	-3.4	2.0	1.7	-1.1	-2.6
Powys	-7.6	-6.8	-1.4	1.4	-0.2	-3.0
Ceredigion	-6.1	-7.1	2.6	1.0	-1.7	-6.5
Pembrokeshire	-4.0	-9.6	-0.1	1.8	-1.2	-2.2
Carmarthenshire	-7.2	-2.1	-0.6	-0.8	-5.2	-8.7
Swansea	-3.6	-0.2	2.7	1.3	-0.9	-3.1
Neath Port Talbot	-4.3	-7.1	-1.3	1.5	-1.2	-4.1
Bridgend	-6.3	-6.7	-0.2	1.8	1.2	-0.5
Vale of Glamorgan	-1.6	-2.8	2.5	2.7	1.5	0.0
Cardiff	-1.7	-0.8	1.5	1.3	1.7	0.8
Rhondda Cynon Taf	-4.4	-5.7	0.9	3.2	1.5	-0.6
Merthyr Tydfil	-4.8	-2.8	1.0	2.2	0.5	-1.0
Caerphilly	-7.7	-7.8	1.1	1.9	1.2	0.1
Blaenau Gwent	-7.5	-13.6	1.5	1.8	0.1	-0.1
Torfaen	-7.4	-12.1	0.3	1.7	0.3	-0.2
Monmouthshire	-6.6	-8.9	2.6	1.5	0.3	0.2
Newport	-6.9	-13.4	1.0	1.1	0.2	0.0

Table 15: Number and percentage of children aged 3 to 4 in single-family households who can speak Welsh in Wales, by household composition, 2001–21

Household composition		2001		2011		2021	
		Number	%	Number	%	Number	%
Lone-parent household	No adults can speak Welsh	1,358	9.8	2,012	14.4	1,060	7.2
	One adult can speak Welsh	1,134	55.1	1,220	53.3	1,240	52.2
	Two or more adults can speak Welsh	12	70.6	16	61.5	20	50
	Total	2,504	15.7	3,248	19.9	2,320	13.5
Couple household	No adults can speak Welsh	3,244	8.6	4,775	13.2	2,335	7.3
	One adult can speak Welsh	2,822	39.8	3,668	45.4	2,860	40.4
	Two or more adults can speak Welsh	3,890	81.8	3,707	82.2	3,615	80.7
	Total	9,956	20	12,150	24.8	8,810	20.3
All single-family households	Total	12,460	19	15,398	23.6	11,130	18.4

(Source: Office of National Statistics)

Table 16: Percentage of children aged 3 to 4 in single-family households who can speak Welsh in Welsh local authorities according to Census 2021, by household composition

Local authority	Lone-parent household		Couple household		
	No adults can speak Welsh	One adult can speak Welsh	No adults can speak Welsh	One adult can speak Welsh	Two or more adults can speak Welsh
Anglesey	11.1	65.9	16.7	42.9	81.2
Gwynedd	31.0	77.0	28.6	60.0	88.7
Conwy	8.8	40.9	8.6	32.4	71.4
Denbighshire	11.2	45.0	9.3	40.7	82.5
Flintshire	5.1	37.5	6.1	23.9	76.5
Wrexham	7.8	43.8	5.1	35.7	68.8
Powys	9.3	50.0	7.6	31.2	75.0
Ceredigion	27.3	77.8	19.6	49.1	83.6
Pembrokeshire	7.2	50.0	8.1	40.0	66.7
Carmarthenshire	15.1	52.6	14.7	52.0	82.6
Swansea	5.8	50.0	6.5	43.1	68.4
Neath Port Talbot	6.3	38.9	7.5	37.3	66.7
Bridgend	4.8	50.0	4.5	27.4	61.5
Vale of Glamorgan	7.1	46.2	8.6	40.9	80.0
Cardiff	5.2	45.8	6.7	48.3	88.9
Rhondda Cynon Taf	7.7	47.2	6.4	43.2	74.3
Merthyr Tydfil	-	33.3	5.2	33.3	-
Caerphilly	7.6	30.4	7.6	37.2	71.4
Blaenau Gwent	5.7	-	3.8	18.8	-
Torfaen	6.1	45.5	7.3	28.0	60.0
Monmouthshire	7.3	-	8.1	33.3	80.0
Newport	3.6	22.2	5.9	28.6	62.5

Table 17: Change in the percentage of children aged 3 to 4 in single-family couple households, who can speak Welsh, by household composition, by local authority (percentage point change), 2001–21

Local authority	Couple households								
	No adults can speak Welsh			One adult can speak Welsh			Two or more adults can speak Welsh		
	2001–11	2011–21	2001–21	2001–11	2011–21	2001–21	2001–11	2011–21	2001–21
Anglesey	5.1	-3.9	1.2	-1.6	-4.6	-6.2	1.2	1.1	2.3
Gwynedd	0.8	-4.7	-3.8	7.7	-3.4	4.3	0.3	-1.3	-1.0
Conwy	9.4	-10.0	-0.6	1.8	-4.2	-2.4	-1.1	-2.5	-3.7
Denbighshire	7.2	-4.3	2.8	11.4	-0.2	11.2	2.0	0.1	2.1
Flintshire	4.2	-4.6	-0.4	2.7	-4.9	-2.1	2.5	17.4	19.8
Wrexham	2.9	-5.0	-2.0	14.6	-4.7	9.9	10.6	-11.3	-0.7
Powys	6.9	-8.2	-1.4	5.5	-13.8	-8.3	10.1	-3.8	6.3
Ceredigion	2.5	-8.9	-6.4	5.7	-9.9	-4.2	-4.5	0.3	-4.2
Pembrokeshire	2.0	-6.2	-4.2	5.9	0.5	6.4	5.6	-10.0	-4.5
Carmarthenshire	9.3	-10.4	-1.1	9.1	-5.0	4.1	0.1	-2.3	-2.1
Swansea	3.1	-3.6	-0.6	7.1	-4.7	2.5	3.0	-7.1	-4.0
Neath Port Talbot	4.5	-4.2	0.3	-5.6	-5.1	-10.6	-10.7	-5.1	-15.9
Bridgend	3.5	-5.6	-2.1	5.5	-8.9	-3.4	-1.5	-9.4	-11.0
Vale of Glamorgan	2.8	-1.5	1.3	10.0	-3.1	6.9	5.7	-7.3	-1.6
Cardiff	2.6	-2.1	0.5	8.4	-0.7	7.7	1.1	4.5	5.6
Rhondda Cynon Taf	3.5	-7.3	-3.7	-1.7	-2.5	-4.2	-2.9	7.1	4.2
Merthyr Tydfil	2.4	-5.5	-3.0	-5.2	-3.0	-8.1	7.0	-	-
Caerphilly	8.1	-9.6	-1.5	10.2	-7.4	2.8	7.3	-1.4	5.9
Blaenau Gwent	5.9	-9.2	-3.3	11.0	-11.5	-0.5	-	-	-
Torfaen	6.3	-8.9	-2.6	4.0	-6.2	-2.2	1.7	-6.7	-5.0
Monmouthshire	10.4	-7.8	2.6	21.5	-10.7	10.7	-6.2	33.3	27.1
Newport	3.7	-6.6	-2.9	18.9	-9.4	9.5	29.5	-14.4	15.1

Table 18: Change in the percentage of children aged 3 to 4 in single-family lone-parent households, who can speak Welsh, by household composition, by local authority (percentage point change), 2001–21

Local authority	Lone-parent households					
	No adults can speak Welsh			One adult can speak Welsh		
	2001–11	2011–21	2001–21	2001–11	2011–21	2001–21
Anglesey	0.2	-14.3	-14.1	-9.0	5.1	-3.9
Gwynedd	-3.3	-6.6	-10.0	8.1	-4.5	3.6
Conwy	8.9	-12.8	-3.8	-2.9	-5.3	-8.2
Denbighshire	10.3	-8.9	1.5	1.3	-3.1	-1.8
Flintshire	2.5	-5.1	-2.6	5.3	12.5	17.8
Wrexham	4.2	-1.5	2.6	15.4	0.1	15.5
Powys	11.4	-10.8	0.6	-11.4	10.3	-1.1
Ceredigion	16.8	-23.7	-6.9	-2.7	14.3	11.5
Pembrokeshire	6.7	-10.6	-4.0	1.7	1.3	3.0
Carmarthenshire	7.7	-9.2	-1.5	-4.6	-3.4	-8.1
Swansea	3.3	-3.4	-0.2	8.0	-4.7	3.3
Neath Port Talbot	-0.6	-4.3	-4.9	-4.2	-12.7	-16.9
Bridgend	9.0	-10.2	-1.3	-4.1	-1.7	-5.8
Vale of Glamorgan	6.3	-8.2	-1.8	2.3	7.4	9.6
Cardiff	5.4	-6.4	-1.0	-3.5	7.7	4.2
Rhondda Cynon Taf	0.7	-6.2	-5.6	-11.5	-0.6	-12.0
Merthyr Tydfil	2.6	-	-	-5.0	13.3	8.3
Caerphilly	2.9	-6.7	-3.8	-11.3	-5.2	-16.5
Blaenau Gwent	0.2	-5.2	-5.1	2.0	-	-
Torfaen	6.5	-8.5	-2.0	-5.0	2.1	-2.8
Monmouthshire	6.8	-7.2	-0.4	27.1	-	-
Newport	4.9	-9.8	-4.9	-7.5	-12.6	-20.1

Table 19: Number and percentage of people aged three years or older able to speak, understand, read and write Welsh in Wales according to Census 2021, by specific skill

Skill	Number	Percentage
Can understand spoken Welsh only	156,762	5.2
Can speak Welsh but cannot read or write Welsh	68,391	2.3
Can speak and read Welsh but cannot write Welsh	33,971	1.1
Can speak, read and write Welsh	429,313	14.2
Other combination of Welsh skills	70,718	2.3
No skills	2,259,017	74.9
Total	3,018,172	100.0

(Source: Office of National Statistics)

Table 20: Comparison of the number and percentage of Welsh speakers able to read or write Welsh in Wales, 1981–2021

Number					Percentage				
1981	1991	2001	2011	2021	1981	1991	2001	2011	2021
358,995	369,609	457,946	430,717	429,313	70.6	72.7	78.6	76.6	79.8

(Source: Office of National Statistics)

Table 22: Change in the number and percentage of Welsh speakers three years and older who can speak, read and write Welsh, by local authority (percentage point change), 2011–21

Local authority	Percentage able to speak, read and write			Number able to speak, read and write		
	2011	2021	Percentage point change 2011–21	2011	2021	Person change 2011–21
Anglesey	79.7	81.0	1.3	30,756	30,316	-440
Gwynedd	85.6	86.0	0.4	65,921	63,256	-2,665
Conwy	75.4	77.9	2.5	23,063	22,605	-458
Denbighshire	75.7	78.6	2.9	16,842	16,459	-383
Flintshire	70.6	74.1	3.5	13,650	12,920	-730
Wrexham	71.2	75.0	3.8	11,867	11,957	90
Powys	73.9	76.1	2.2	17,724	16,256	-1,468
Ceredigion	81.9	82.4	0.5	28,629	26,104	-2,525
Pembrokeshire	72.3	75.7	3.4	16,466	15,617	-849
Carmarthenshire	74.7	77.6	2.9	58,321	56,493	-1,828
Swansea	70.8	76.8	6.0	18,634	19,951	1,317
Neath Port Talbot	70.7	75.5	4.8	14,634	14,095	-539
Bridgend	74.5	78.1	3.6	9,758	10,177	419
Vale of Glamorgan	75.9	81.1	5.2	10,013	11,946	1,933
Cardiff	78.8	83.2	4.4	28,932	35,578	6,646
Rhondda Cynon Taf	78.4	81.8	3.4	21,774	23,345	1,571
Merthyr Tydfil	73.7	79.8	6.1	3,706	4,052	346
Caerphilly	75.4	81.3	5.9	14,524	14,502	-22
Blaenau Gwent	70.5	75.5	5.0	3,723	3,048	-675
Torfaen	72.3	78.5	6.2	6,250	5,783	-467
Monmouthshire	72.6	78.1	5.5	6,373	6,133	-240
Newport	70.4	75.2	4.8	9,157	8,717	-440

Table 25: Number and percentage of people aged three years or older able to speak Welsh in Wales according to Census 2021, by ethnic group

Ethnic group	Total usual residents aged 3 and over	Can speak Welsh	
		Number	Percentage
White	2,835,561	522,261	18.4
Asian, Asian British or Asian Welsh	86,049	5,536	6.4
Black, Black British, Black Welsh, Caribbean or African	26,282	1,596	6.1
Mixed or multiple ethnic groups	45,018	7,405	16.4
Other ethnic group	25,260	1,498	5.9

(Source: Office of National Statistics)

Table 26: Number and percentage of people aged three years or older who can speak Welsh and people who can speak Welsh from ethnic groups (excluding white ethnic groups) according to Census 2021, by local authority

Local authority	Number of Welsh speakers	Percentage of Welsh speakers	Number of Welsh speakers from ethnic groups (excluding white ethnic groups)	Percentage of Welsh speakers from ethnic groups (excluding white ethnic groups)
Anglesey	37,413	55.8	426	1.1
Gwynedd	73,560	64.4	1,049	1.4
Conwy	29,000	25.9	453	1.6
Denbighshire	20,946	22.5	316	1.5
Flintshire	17,428	11.6	334	1.9
Wrexham	15,953	12.2	424	2.7
Powys	21,358	16.4	273	1.3
Ceredigion	31,678	45.3	492	1.6
Pembrokeshire	20,626	17.2	346	1.7
Carmarthenshire	72,838	39.9	847	1.2
Swansea	25,986	11.2	1,217	4.7
Neath Port Talbot	18,662	13.5	360	1.9
Bridgend	13,037	9.2	357	2.7
Vale of Glamorgan	14,737	11.5	726	4.9
Cardiff	42,757	12.2	5,132	12.0
Rhondda Cynon Taf	28,556	12.4	658	2.3
Merthyr Tydfil	5,079	8.9	116	2.3
Caerphilly	17,837	10.4	372	2.1
Blaenau Gwent	4,035	6.2	97	2.4
Torfaen	7,366	8.2	202	2.7
Monmouthshire	7,852	8.7	234	3.0
Newport	11,594	7.5	1,598	13.8

Table 27: Change in the number of people able to speak Welsh from ethnic groups (excluding white ethnic groups), by local authority, 2011–21

Local authority	Number of Welsh speakers 2021	Number of Welsh speakers from ethnic groups (excluding white ethnic groups) 2011	Number of Welsh speakers from ethnic groups (excluding white ethnic groups) 2021	Person change
Anglesey	37,413	329	426	+97
Gwynedd	73,560	868	1,049	+181
Conwy	29,000	362	453	+91
Denbighshire	20,946	256	316	+60
Flintshire	17,428	184	334	+150
Wrexham	15,953	250	424	+174
Powys	21,358	237	273	+36
Ceredigion	31,678	435	492	+57
Pembrokeshire	20,626	259	346	+87
Carmarthenshire	72,838	554	847	+293
Swansea	25,986	818	1,217	+399
Neath Port Talbot	18,662	249	360	+111
Bridgend	13,037	268	357	+89
Vale of Glamorgan	14,737	391	726	+335
Cardiff	42,757	3,090	5,132	+2,042
Rhondda Cynon Taf	28,556	398	658	+260
Merthyr Tydfil	5,079	95	116	+21
Caerphilly	17,837	254	372	+118
Blaenau Gwent	4,035	68	97	+29
Torfaen	7,366	204	202	-2
Monmouthshire	7,852	162	234	+72
Newport	11,594	1,238	1,598	+360

Table 28: Distribution of Welsh speakers according to Census 2021, by ethnic group and age group

Ethnic group	Percentage by age group								
	3–4	5–9	10–15	16–24	25–34	35–49	50–64	65–74	75+
White	95.8	93.0	92.6	96.0	98.3	98.8	99.4	99.6	99.8
Asian, Asian British or Welsh Asian	0.9	2.3	3.0	1.6	0.4	0.3	0.1	0.1	0.0
Black, Black British, Black Welsh, Caribbean or African	0.4	0.8	0.8	0.4	0.1	0.1	0.1	0.0	0.0
Mixed or multiple ethnic groups	2.8	3.4	3.0	1.7	1.0	0.6	0.3	0.2	0.2
Other ethnic group	0.2	0.6	0.7	0.4	0.2	0.2	0.1	0.1	0.0

(Source: Office of National Statistics)

Table 29: Number of people aged three years or older able to speak Welsh according to Census 2021, by ethnic group and age group

Ethnic group	Number by age group								
	3–4	5–9	10–15	16–24	25–34	35–49	50–64	65–74	75+
White	11,438	51,484	73,500	70,753	63,136	80,415	80,075	45,726	45,732
Asian, Asian British or Welsh Asian	106	1,244	2,343	1,157	273	254	94	44	20
Black, Black British, Black Welsh, Caribbean or African	42	415	597	301	82	76	59	14	9
Mixed or multiple ethnic groups	331	1,856	2,369	1,266	669	483	276	85	68
Other ethnic group	29	329	536	261	94	127	80	32	11

(Source: Office of National Statistics)

Table 31: Distribution of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by occupation and local authority

Local authority	Occupations								
	Professional	Professional and technical contact	Skilled trades	Administrative and secretarial	Sales and customer services	Elementary	Managers, directors and senior officers	Process, equipment and machinery operators	Caring, leisure and other service occupations
Anglesey	17.1	10.9	16.5	8.4	7.8	9.6	8.8	6.9	13.9
Gwynedd	17.5	10.2	17.2	7.9	7.3	10.6	8.6	7.0	13.7
Conwy	20.1	13.0	16.4	8.1	7.0	8.1	9.8	5.1	12.3
Denbighshire	22.4	12.5	15.1	8.3	6.0	7.7	10.1	6.4	11.4
Flintshire	24.5	14.1	9.9	9.0	7.5	7.3	9.7	5.7	12.3
Wrexham	23.8	13.7	10.5	9.4	7.4	8.4	7.9	6.4	12.5
Powys	19.9	11.3	20.5	7.7	5.6	8.5	9.6	5.5	11.4
Ceredigion	17.9	10.8	21.7	8.9	6.3	8.7	9.9	5.4	10.5
Pembrokeshire	19.2	9.9	20.2	7.4	6.1	9.0	10.2	5.7	12.3
Carmarthenshire	20.0	11.5	16.7	8.7	7.1	7.9	9.1	6.7	12.2
Swansea	28.9	14.1	7.5	10.7	8.6	7.7	8.8	3.6	10.1
Neath Port Talbot	21.2	13.9	10.8	11.1	7.8	7.2	8.4	6.5	13.0
Bridgend	27.0	15.1	8.1	9.5	7.5	7.0	9.8	4.1	12.0
Vale of Glamorgan	29.9	19.1	5.2	8.4	6.5	5.7	11.8	3.1	10.4
Cardiff	38.6	19.7	3.9	8.3	6.9	4.7	9.8	1.6	6.6
Rhondda Cynon Taf	24.9	15.2	9.5	9.1	8.1	7.1	8.0	5.1	12.9
Merthyr Tydfil	23.3	16.2	8.3	8.9	9.4	8.0	7.5	4.5	13.9
Caerphilly	25.0	15.9	8.4	9.4	8.0	7.7	7.9	5.3	12.4
Blaenau Gwent	22.7	13.5	7.0	7.6	8.9	8.6	7.9	6.8	17.1
Torfaen	24.1	13.5	9.0	8.2	9.0	7.8	8.1	4.6	15.6
Monmouthshire	31.2	15.6	6.5	6.6	7.0	9.6	10.8	2.9	9.8
Newport	28.4	17.4	4.9	10.0	9.5	8.5	7.8	3.1	10.5

Table 32: Number of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by occupation and local authority

Local authority	Galwedigaethau								
	Professional	Professional and technical contact	Skilled trades	Administrative and secretarial	Sales and customer services	Elementary	Managers, directors and senior officers	Process, equipment and machinery operators	Caring, leisure and other service occupations
Anglesey	2,942	1,871	2,833	1,449	1,347	1,639	1,517	1,178	2,385
Gwynedd	6,193	3,629	6,095	2,796	2,572	3,738	3,061	2,495	4,836
Conwy	2,722	1,765	2,225	1,102	946	1,092	1,331	687	1,665
Denbighshire	2,136	1,196	1,443	796	575	733	963	608	1,084
Flintshire	1,786	1,029	725	654	550	530	705	414	894
Wrexham	1,454	836	645	577	456	512	486	392	764
Powys	1,846	1,045	1,900	711	521	788	886	513	1,058
Ceredigion	2,673	1,612	3,244	1,328	935	1,307	1,481	801	1,565
Pembrokeshire	1,668	864	1,757	648	531	780	884	500	1,073
Carmarthenshire	6,418	3,704	5,366	2,807	2,273	2,527	2,926	2,144	3,930
Swansea	2,664	1,301	693	983	791	713	816	331	930
Neath Port Talbot	1,569	1,031	796	824	575	530	621	484	965
Bridgend	1,483	830	445	520	412	385	539	225	658
Vale of Glamorgan	1,744	1,110	303	489	377	333	685	180	605
Cardiff	7,038	3,597	706	1,506	1,254	863	1,789	289	1,206
Rhondda Cynon Taf	3,188	1,946	1,219	1,170	1,031	911	1,026	651	1,651
Merthyr Tydfil	487	339	173	186	197	168	157	95	290
Caerphilly	1,708	1,089	573	644	548	525	542	364	847
Blaenau Gwent	312	185	96	104	122	118	109	94	235
Torfaen	544	304	203	186	204	176	183	104	351
Monmouthshire	715	358	148	152	161	220	248	66	224
Newport	993	608	173	349	331	296	272	108	367

Table 33: Distribution of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority, by industry

Local authority	Industry							
	Public administration, education and health	Agriculture, energy and water	Construction	Delivery, accommodation and food services	Transport and communication	Financial, real-estate, professional and administrative activities	Manufacturing	Other
Anglesey	40.9	7.8	10.3	18.3	5.0	8.5	5.4	3.8
Gwynedd	39.2	7.8	10.5	18.8	5.1	8.9	4.7	5.0
Conwy	42.5	8.8	8.3	17.4	4.2	10.2	3.7	4.8
Denbighshire	43.2	8.9	9.1	14.1	4.4	9.7	6.2	4.4
Flintshire	42.7	3.8	6.3	16.5	4.7	11.7	9.6	4.6
Wrexham	44.0	3.8	6.7	16.4	4.8	10.7	9.2	4.3
Powys	37.5	14.8	8.3	14.4	4.7	9.6	5.6	5.1
Ceredigion	36.9	12.9	9.4	17.0	4.1	9.6	4.0	6.1
Pembrokeshire	36.4	12.4	9.4	18.8	4.7	8.7	4.6	5.0
Carmarthenshire	42.6	8.2	9.7	16.5	4.9	8.3	5.8	4.0
Swansea	49.3	2.0	5.7	17.2	5.4	11.7	4.3	4.5
Neath Port Talbot	46.1	2.5	8.6	14.7	5.1	11.0	8.2	3.8
Bridgend	46.8	1.9	6.3	15.8	5.9	11.1	7.6	4.7
Vale of Glamorgan	47.2	1.9	5.0	13.7	7.6	15.0	3.7	6.0
Cardiff	48.5	1.5	3.5	11.7	9.5	15.8	2.4	7.1
Rhondda Cynon Taf	46.9	2.0	8.2	14.8	5.8	10.7	6.6	4.9
Merthyr Tydfil	49.4	3.1	6.9	15.8	6.2	9.7	5.7	3.2
Caerphilly	47.6	2.7	7.1	14.5	5.3	11.4	7.2	4.1
Blaenau Gwent	49.7	1.6	6.5	16.0	3.7	9.5	9.0	4.1
Torfaen	48.1	1.6	7.1	17.5	4.5	10.9	5.7	4.6
Monmouthshire	46.3	3.1	3.4	17.9	6.2	13.0	5.2	4.9
Newport	47.1	1.7	4.0	18.0	5.8	13.5	5.2	4.7

Table 34: Number of Welsh speakers aged 16 and over in work the week leading up to Census 2021, by local authority, by industry

Local authority	Industry							
	Public administration, education and health	Agriculture, energy and water	Construction	Delivery, accommodation and food services	Transport and communication	Financial, real-estate, professional and administrative activities	Manufacturing	Other
Anglesey	7,018	1,336	1,771	3,142	866	1,450	922	653
Gwynedd	13,874	2,760	3,722	6,674	1,805	3,169	1,657	1,754
Conwy	5,758	1,194	1,128	2,353	567	1,384	505	646
Denbighshire	4,121	851	868	1,341	415	928	588	423
Flintshire	3,111	277	460	1,204	346	856	697	336
Wrexham	2,690	234	413	1,004	295	653	565	266
Powys	3,472	1,375	769	1,334	432	886	523	475
Ceredigion	5,514	1,928	1,405	2,546	617	1,428	602	906
Pembrokeshire	3,171	1,076	821	1,633	411	760	400	432
Carmarthenshire	13,661	2,637	3,127	5,296	1,572	2,656	1,858	1,288
Swansea	4,543	184	528	1,582	494	1,075	399	417
Neath Port Talbot	3,407	184	635	1,089	377	811	609	284
Bridgend	2,570	102	346	869	325	608	420	257
Vale of Glamorgan	2,749	108	289	797	445	875	218	347
Cardiff	8,853	268	647	2,132	1,726	2,888	442	1,293
Rhondda Cynon Taf	6,006	258	1,052	1,889	737	1,375	847	630
Merthyr Tydfil	1,035	65	145	331	129	204	120	66
Caerphilly	3,257	185	488	991	364	776	493	283
Blaenau Gwent	683	22	89	220	51	130	123	56
Torfaen	1,085	37	159	394	102	245	129	104
Monmouthshire	1,061	72	78	411	142	297	119	113
Newport	1,650	58	141	631	202	471	182	165

Part 2: Creating Welsh speakers

Shwmae

Helo



In evaluating the position of the Welsh language today **it is inevitable that the focus will be on assessing the progress made in creating more Welsh speakers.** After all, reaching one million Welsh speakers by 2050 is the first and the most prominent strategic theme of the Welsh Government's *Cymraeg 2050* strategy.

On the one hand, our analysis of the census provides the simple answer to the question of whether or not there has been an increase in the number of Welsh speakers over the reporting period. As we have already seen, the results of the 2021 Census report that the number of Welsh speakers has fallen from 562,016 in 2011 to 538,296 in 2021. This is consistent with the findings of other surveys. Although the Annual Population Survey offers very different numbers, it also reports that there are fewer Welsh speakers today than there were five years ago (836,800 in the year ending June 2025 compared to 883,600 in December 2020).

However, behind these bare facts and figures we know that the picture is considerably more complex and we must consider the evidence within a far wider context in order to properly evaluate the position of the Welsh language today. This section is an opportunity to focus in greater detail on some of the policy areas that are central to the efforts of creating more Welsh speakers. It highlights important strategic areas such as language transmission within the family; the key role of childcare and early years education; the significant work taking place within the statutory and tertiary education sectors, and also the increasingly prominent contribution of the Welsh for adults sector.

This report is an opportunity to pause and reflect on whether we have evidence that the policies that are in place are going to lead to the creation of more Welsh speakers in the future. We will do this by considering the progress made in these key areas during the reporting period, before highlighting the priorities and opportunities the Commissioner has identified for the next five years.

1. Language transmission

Alongside education, the transmission of the language from one generation to the next remains the primary means of creating Welsh speakers. Although most children today are likely to learn Welsh at school rather than at home, language transmission continues to be one of the cornerstones of language planning.

The Welsh Government's policy on the transmission of Welsh within families recognises that part of the importance of language transmission is that surveys and research 'clearly show that use of Welsh at home as a child is a determiner of the frequency of use of Welsh in later life'.¹ It is also crucial because we cannot rely on the education system alone to produce Welsh speakers. For the Welsh language to thrive as a community and social language in the long term, it must be passed from one generation to the next and used naturally in everyday life.

1.1 Main developments

Significant steps were taken during the reporting period to strengthen policy and support for Welsh language transmission in the home. The most important of these is the **National policy on Welsh language transmission and use in families** published by the Government in January 2021. The policy sets out a clear and holistic strategic framework, with the overarching aim of increasing the use of Welsh in households where people can already speak the language.

It focuses on:

- inspiring children and young people to speak Welsh to their own children in the future
- reigniting the Welsh language skills of those who may not have used Welsh since their school days, or who lack confidence in their language skills, to speak Welsh with their own children
- supporting and encouraging use of the Welsh language within families where not everybody speaks Welsh
- supporting Welsh-speaking families to speak Welsh with their children.

¹ Welsh Government, [National policy on Welsh language transmission and use in families](#) (January 2021).

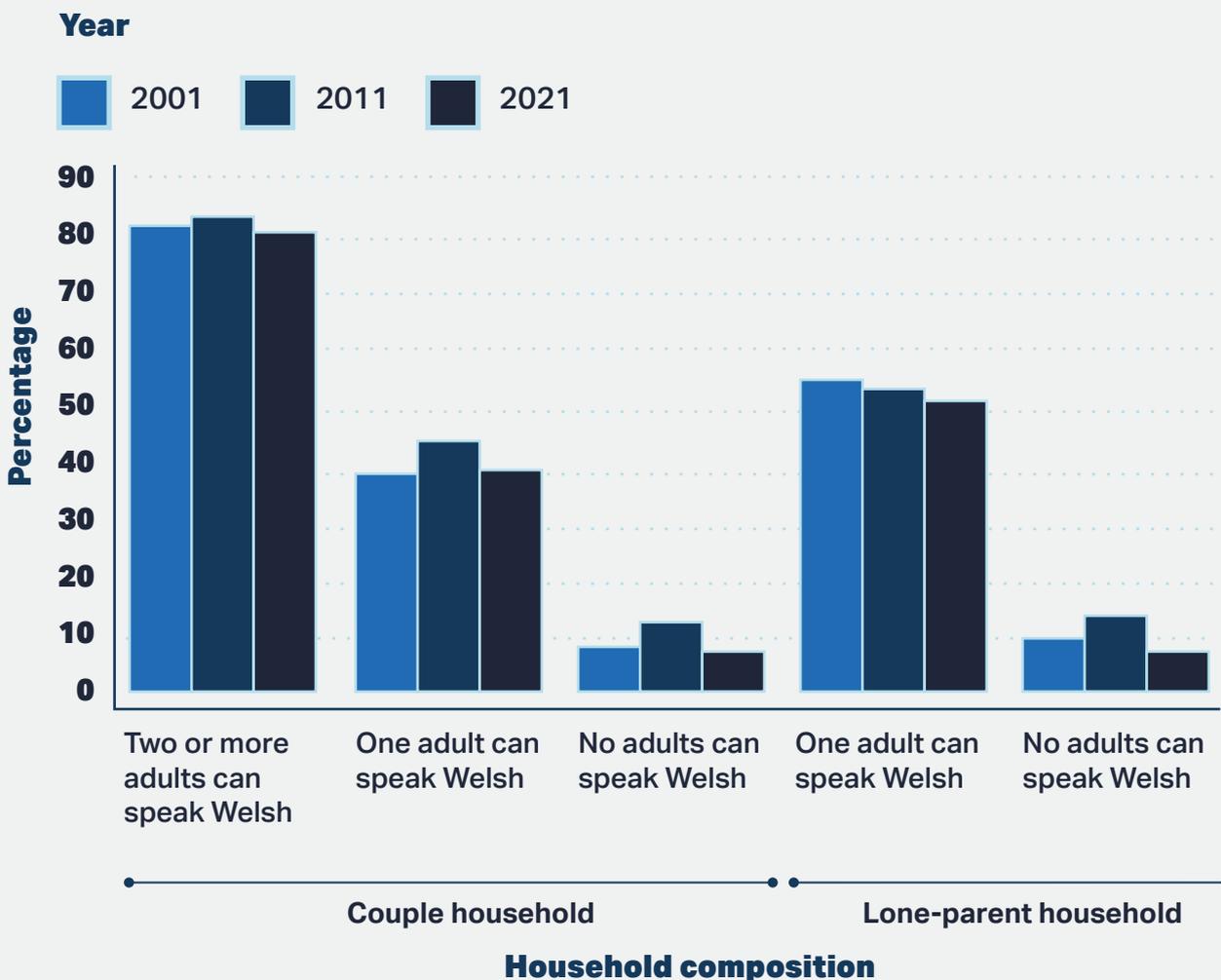
The policy, grounded in the principles of behavioural science, provides the basis for a ten-year work programme that includes a range of interventions designed to achieve these objectives.

These additional interventions build on significant work done in the past as part of the Twf scheme, and more recently, **Cymraeg i Blant (Cymraeg for Kids)** – a scheme that remains a key part of the integrated national policy. Cymraeg i Blant is a national scheme that offers free sessions to parents and their children, with the aim of supporting parents to use Welsh with their children, and to choose Welsh-medium childcare and education for them. In 2023–24, for example, a total of 3,503 virtual and face-to-face sessions were held supporting 26,945 parents and 27,312 children. The National Centre for Learning Welsh also contributes to this field through initiatives such as Welsh at Home and Clwb Cwtsh.

1.2 The evidence

The results of the 2021 Census do not, of course, provide evidence of the impact of the national policy published in the same year, but they do provide valuable insight into trends in Welsh language transmission, and offer important context for ongoing efforts to support language transmission.

Chart 1: Percentage of children aged 3–4 living in one-family households who can speak Welsh in Wales according to the 2001–21 Census, by the linguistic composition of the household



(Source: Office of National Statistics)

A detailed discussion of language transmission in the home can be found in Part 1, Section 8. It is based on an analysis of the number of 3- to 4-year-olds who speak Welsh in relation to the linguistic composition of their household. The assumption is that a 3- to 4-year-old who speaks Welsh is likely to have learned Welsh at home rather than at school.

Chart 1 illustrates that in 2021 80.7% of children aged 3–4, who lived in a couple household where two or more adults can speak Welsh, were able to speak Welsh. This ‘transmission rate’ is broadly consistent with the results of the 2001 and 2011 Census, and remains substantially higher than transmission rates in any other type of household.

The proportion of 3- to 4- year-olds who can speak Welsh is significantly lower in households where only one adult can speak Welsh, whether in a couple household or a lone-parent household. The rate of transmission of Welsh in couple households, where one adult can speak Welsh, fell from 45.4% in 2011 to 40.4% in 2021. The transmission rate in lone-parent households where one adult can speak Welsh remained fairly stable between 2011 (53.3%) and 2021 (52.2%).

Although the transmission rate is relatively high in households where two adults can speak Welsh, these households represent only a small proportion of families in Wales. Of all households with dependent children in Wales, just 10% include adults who can all speak Welsh.² 26% of all households with dependent children include one adult, but not all adults, who can speak Welsh.



10% the percentage of households with dependent children where all adults can speak Welsh

26% the percentage of households with dependent children where one adult, but not all adults, can speak Welsh

In 2022 the Welsh Government established the Commission for Welsh-speaking Communities to make recommendations for strengthening public policy to improve the linguistic sustainability of Welsh-speaking communities. In 2024 the Commission published its first report,³ which also included an in-depth analysis of the 2021 Census results. The Commission collaborated with Prosiect BRO⁴ to develop the analysis which focused specifically on the four local authorities in Wales with the highest density of Welsh speakers: Gwynedd, Anglesey, Ceredigion and Carmarthenshire.

² Prosiect BRO Compendium of Census 2021 Language Statistics.

³ Commission for Welsh-speaking Communities, [Empowering Communities, strengthening the Welsh language](#) (August 2024).

⁴ BRO: A Comprehensive Sociolinguistic Survey of Contemporary Welsh-speaking Communities | University of Wales Trinity Saint David.

The analysis focuses on some of the most important trends in the four local authorities at the Lower Layer Super Output Areas (small areas) level, which is a small geographical area comprising between 1,000 and 3,000 people and between 400 and 1,200 households. This analysis shows that the stability of the Welsh language in communities with a high density of speakers is under threat, and that this also has implications in terms of the potential and likelihood of language transmission in the home. For example:

- In the four local authorities in question, **there were a total of 268 small areas. 194 of these small areas had over 40% Welsh speakers.**
- Data on **Welsh-speaking households** in local authorities also show the higher capacity in these areas for the transmission of Welsh in the home. The percentage of households where **all adults can speak Welsh** was **63%** in Gwynedd, **48%** in Anglesey, **36%** in Ceredigion and **23%** in Carmarthenshire. **The figure for the whole of Wales is 10%, and stands at only 5% when these four local authorities are excluded.**
- Of the 268 small areas across the four local authorities, **252 saw a decline of between 1 and 21 percentage points** in the proportion of Welsh speakers between 2011 and 2021.

Table 1 provides a more long-term comparison of trends in the percentage of speakers in these four local authorities with the highest density of Welsh speakers.

Table 1: Comparison of percentages of people who can speak Welsh by local authority, 1981–2021

	1981	1991	2001	2011	2021
Anglesey	61.0	62.0	60.1	57.2	55.8
Gwynedd	73.8	72.1	69.0	65.4	64.4
Ceredigion	63.2	59.1	52.0	47.3	45.3
Carmarthenshire	59.0	54.8	50.3	43.9	39.9

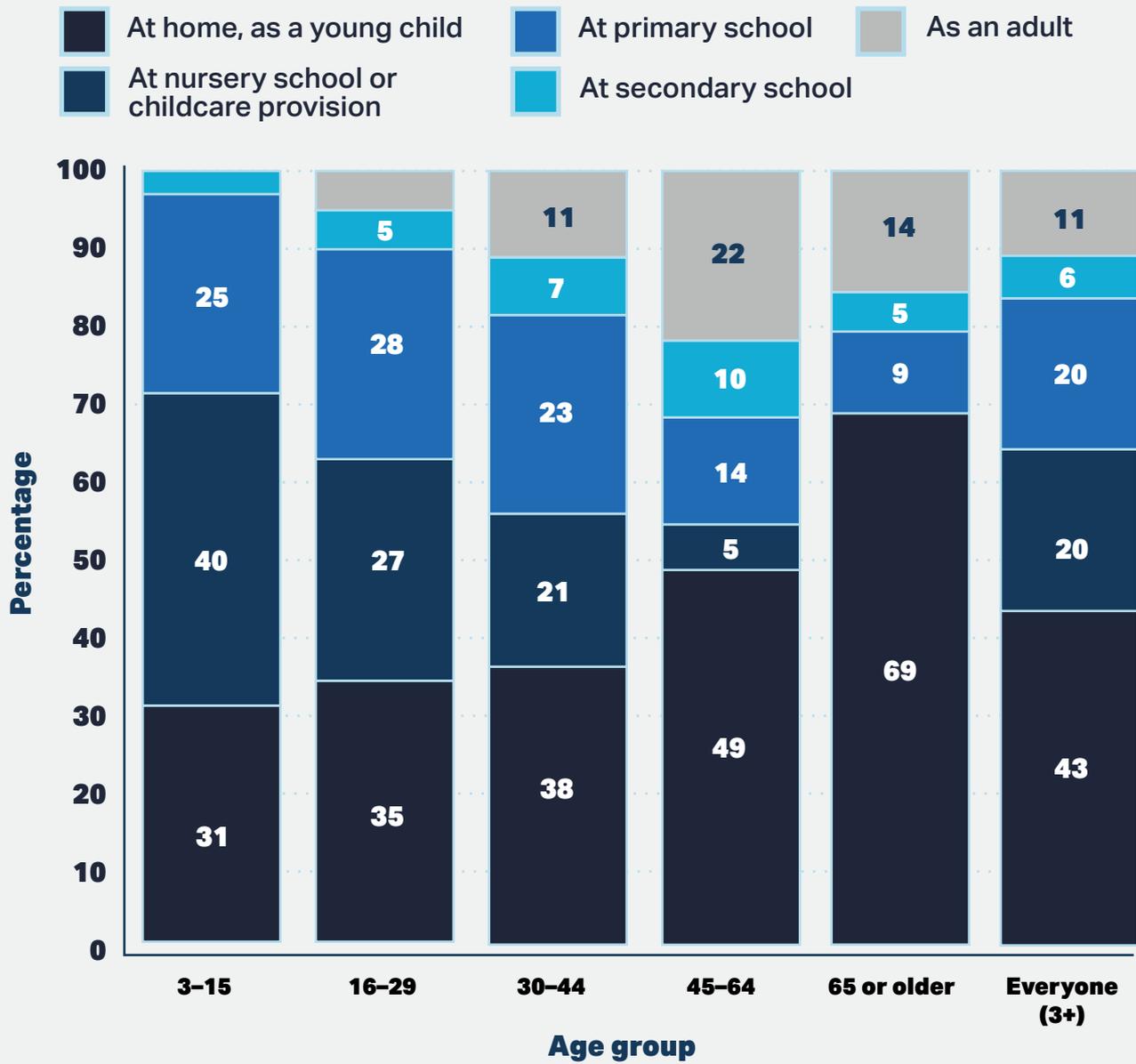
(Source: Office of National Statistics)

The statistics in the table highlight the importance of these areas in transmitting the language from one generation to the next. At the same time, the statistics also show that the percentage – or density – of Welsh speakers in these areas is decreasing. This is likely to mean fewer households where all adults speak Welsh, reducing the potential and likelihood that Welsh will be transmitted in the home.

The results of the 2021 Language Use Survey also provide useful information about language transmission.⁵

⁵ Welsh Government, [Welsh language use in Wales \(initial findings\): July 2019 to March 2020](#) (First published September 2021).

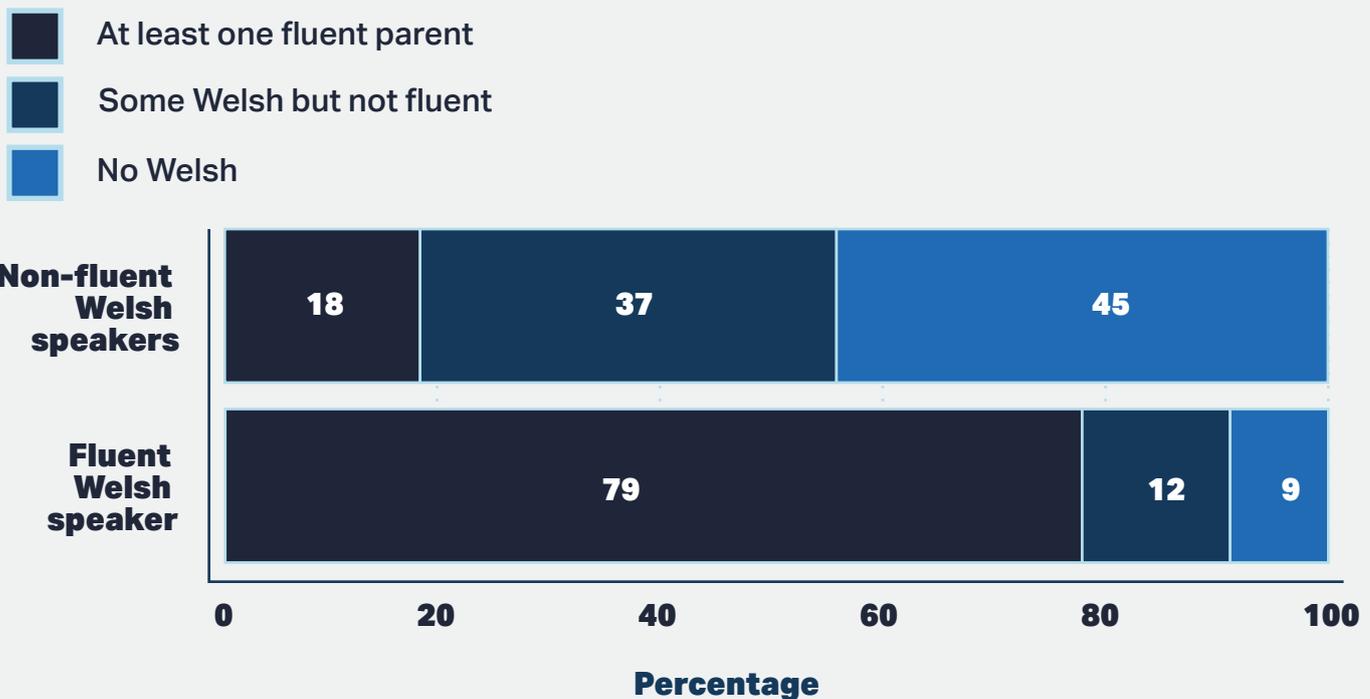
Chart 2: Where and when Welsh speakers started learning to speak the language, by age



(Source: Welsh Language Use Survey 2019–20)

The Language Use Survey data reinforces the census findings, **highlighting that young Welsh speakers are far more likely to have learned Welsh within the education system.** While almost 70% of Welsh speakers aged 65 and over have learnt Welsh at home, only around 30% of Welsh speakers aged 3–15 have learnt their Welsh there. This demonstrates a significant decline over the past half-century in the proportion of people acquiring Welsh in the home. The survey also provides valuable evidence on the relationship between the linguistic composition of the home and fluency in Welsh. As Chart 3 shows, **almost 80% of individuals who considered themselves fluent Welsh speakers had at least one Welsh-speaking parent.** Conversely, only 18% of people who had at least one parent who could speak Welsh fluently reported that they themselves weren't fluent.

Chart 3: Fluency of Welsh speakers according to their parents' fluency



(Source: Welsh Language Use Survey 2019–20)

1.3 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

Overall, the latest evidence reinforces what we already know about language transmission. Further evidence was seen during the reporting period of the importance of Welsh language transmission as a key element of language planning, particularly in relation to the desire to create fluent Welsh speakers who are likely to use the language regularly. The statistics also show that transmission rates have remained broadly unchanged over the past twenty years. However, the **results of the 2021 Census highlight worrying trends regarding the position of the Welsh language in the areas with the highest density of speakers, and the potential implications of this for future language transmission.**

The lack of progress in Welsh language transmission rates over recent decades confirm that this is a **complex policy area and that efforts to support language transmission are up against powerful social and demographic forces.** Nevertheless, the **publication of the national policy on Welsh language transmission represents an important step forward,** laying a stronger foundation for future interventions in this key policy area.

National policy is already focused on the main challenges highlighted by the evidence. There is a clear opportunity to stimulate an **increase in transmission rates in families where one adult speaks Welsh.** Currently, a very significant percentage (around 60%) of 3- to 4-year-olds are unable to speak Welsh despite living in households where one adult can speak the language. If the rate could be increased in this type of household there is clear potential to create many more Welsh speakers in the future, who are more likely to have the confidence to use Welsh naturally in all aspects of life. Organisations such as Mudiad Meithrin, the mentrau iaith and the National Centre for Learning Welsh have a crucial role in this respect.

Although not directly related to language transmission, **influencing parental decisions about the language medium of education, and, in time, trying to influence these young people themselves in terms of their future language use,** is essential to improving transmission rates in the long term. It is therefore encouraging that national policy also places a strong focus on the next generation.

Despite the importance of the national policy and its focus on supporting Welsh-speaking families to speak Welsh with their children, it is also essential to recognise the significance and influence of wider policy areas on rates of Welsh language transmission at home. **Policies in areas such as education, the workplace and the economy can ultimately have a greater impact** on Welsh-language transmission than interventions aimed solely at language transmission itself. This is particularly true in areas with a high density of Welsh speakers. Census evidence shows that the Welsh language is under increasing pressure in those areas where language transmission has been relatively healthy to date. Supporting language transmission therefore requires ensuring that these **communities have thriving local economies, that young people stay or return, that high-quality jobs are available locally, and that more young people are able to raise their families within their communities.**

Priority



The rates of Welsh language transmission from one generation to the next must be improved. Achieving this requires strengthening the position of the language in areas with a high density of Welsh speakers, where transmission remains relatively robust. The recommendation of the Commission for Welsh-speaking Communities to establish areas of higher linguistic significance must be implemented, and additional investment should be provided to Mudiad Meithrin, the mentrau iaith and others in the field to enable them to target interventions more effectively and at greater scale.

In line with some of the other recommendations of this report, we believe that the **promotion standards and promotion strategies** required of local authorities could further contribute to the implementing the national policy and provide a clearer framework for more strategic planning in language transmission.

2. Early years

If the Welsh language is not transmitted in the home, immersing children in the language as early as possible in the childcare and education system is the most likely means of creating fluent speakers. The *Cymraeg 2050* strategy identifies the early years sector as a crucial entry point to Welsh-medium immersion education. This is the principal method for ensuring that children can develop their Welsh language skills, and for creating new speakers.⁶ Expanding the provision of Welsh-medium childcare and early years education is therefore essential to achieving the goal of reaching one million Welsh speakers.

2.1 Main developments

One of the most significant developments over the past five years stemmed from the Co-operation Agreement published by the Welsh Government and Plaid Cymru in 2021.⁷ As part of this agreement, the Government committed to **expanding free childcare to all two-year-olds with a particular focus on providing and strengthening Welsh-medium childcare**. The scheme is being rolled out gradually through the Flying Start programme, with the Government intending to work with partners to expand Welsh-medium provision and develop the workforce.⁸ The Government reported in 2024 that over 1,000 children received Welsh-medium childcare through the Flying Start expansion programme.⁹

There have been other important developments in the early years sector in relation to the Welsh language. The **Welsh in Education Strategic Plans (Wales) Regulations 2019** came into force on 1 January 2020. Following this, local authorities' commitments were published in their new Welsh in Education Strategic Plans (WESPs) for 2022–32.¹⁰ These plans set out the response to the duty now placed on all local authorities to meet Outcome 1: More nursery/three-year-old learners receive their education through the medium of Welsh.

The Welsh Language and Education (Wales) Act 2025, which received royal assent on 7 July 2025, represents a major development that will have a far-reaching impact on the early years sector. The Act places a duty on the Welsh Ministers to draw up a National Framework for Welsh Language Education and Learning Welsh. The framework must outline the steps that Welsh Ministers will take to provide **opportunities to learn Welsh through childcare for those under**

⁶ Welsh Government, *Cymraeg 2050: A Million Welsh Speakers* (July 2017).

⁷ Welsh Government, *The Co-operation Agreement* (December 2021).

⁸ Welsh Government, *Phased expansion of early years provision* | GOV. WALES (Updated December 2024).

⁹ Welsh Government, *Cymraeg 2050: A million Welsh speakers. Annual report 2023-24* (November 2024).

¹⁰ *Welsh in Education Strategic Plans 2022 to 2032* [HTML] | GOV.WALES.

compulsory school age as well as through nursery education. Maintained nursery schools are required to produce a plan for the delivery of Welsh-medium education, detailing the amount of Welsh-medium nursery education provided by the nursery school and proposals for maintaining and increasing that amount, as well as proposals for promoting the use of the Welsh language in the nursery school.

This underlines the importance of the pre-statutory phase to the Government's strategy to increase the number of people learning and using Welsh. Mudiad Meithrin has stressed that the statutory education sector should not be viewed in isolation from the childcare and early years education sector.¹¹ The **Commission for Welsh-speaking Communities has reinforced this position by calling for greater consistency in language policy in the early years sector and statutory primary education in areas of higher density linguistic significance.** In its report *Empowering communities, strengthening the Welsh language*, it recommends that all non-maintained playgroups and nursery settings in those areas should adhere to a policy of Welsh-medium provision and that there should be an investment in the workforce to achieve this.¹²

In 2019 the **Welsh Government announced a new, coherent approach to planning and delivering education and care for children under the age of five**, known as Early Childhood Education and Care. This approach has since evolved into Early Childhood Play, Learning and Care (ECPLC). The **Early Childhood Play, Learning and Care Plan**, published in 2024, sets out the central importance of Welsh-medium childcare and nursery education provision in increasing the uptake of Welsh-medium education and supporting language transmission in the home. It states that the expansion of Flying Start childcare provision supports this. The Plan outlines the Government's intention to grow the Welsh-speaking workforce and expand provision, including through Mudiad Meithrin's Set up and Succeed scheme and the work of the Cwlwm consortium.¹³

2.2 The evidence

Expanding Welsh-medium provision

Mudiad Meithrin continues to expand Welsh-medium provision, opening new cylchoedd meithrin (nursery groups) through the Set up and Succeed programme. The *Cymraeg 2050* strategy, published in 2017, set a target to expand the Welsh medium provision in early years by establishing a further 150 cylch meithrin within a decade. By the end of 2025 it was reported that **a further 100 cylch meithrin had been opened or had expended their provision with the support of the scheme since 2017, with a further 12 projects under way.**¹⁴

Chart 4 shows that the overall number of cylchoedd meithrin and settings has remained relatively stable since 2015/16. **Between 2015/16 and 2024/25 the number of cylchoedd meithrin fell from 467 to 399, while the number of settings increased slightly from 358 to 359.** It is important to note, however, that these changes may reflect shifts in the type of provision offered – for example, moving from sessional to full-day care – or the consolidation of several smaller cylchoedd into a single larger cylch. In such cases, the level of provision would not be reduced.

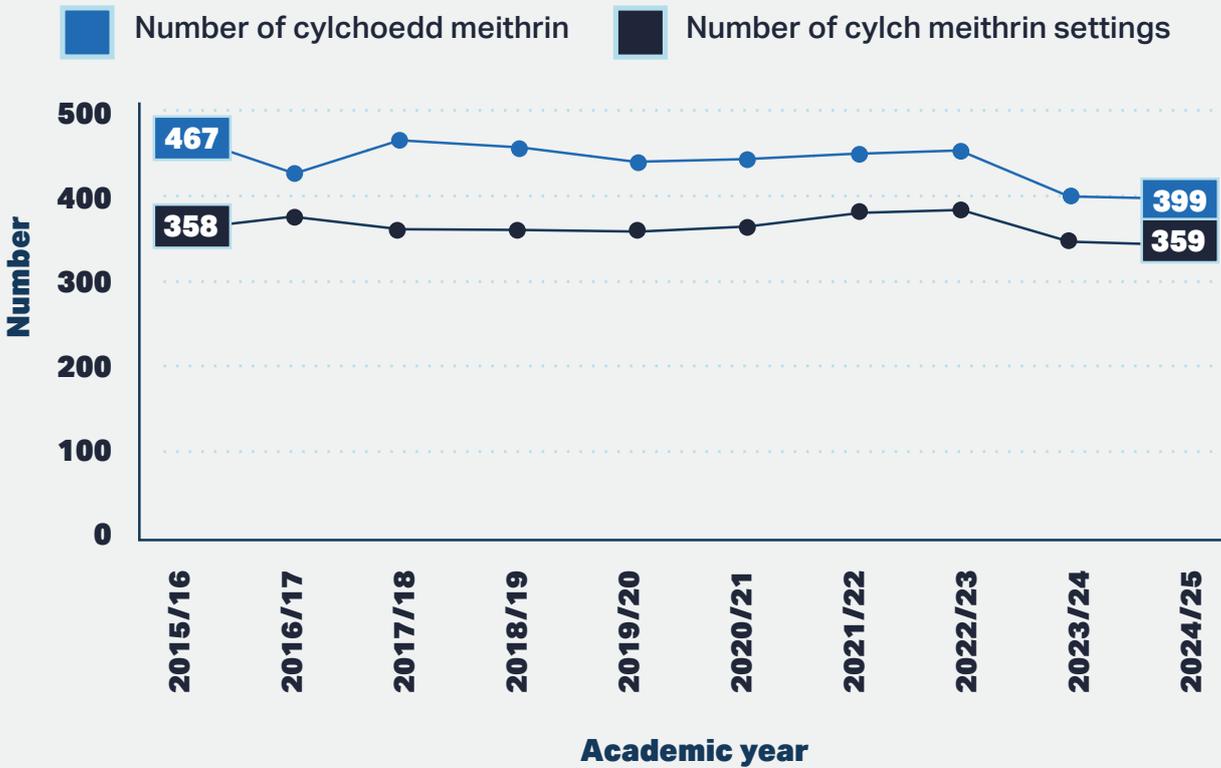
¹¹ Mudiad Meithrin's response to the Children, Young People and Education Committee's inquiry into the general principles of the [Welsh Language and Education \(Wales\) Bill](#).

¹² Commission for Welsh-speaking Communities, [Empowering Communities, strengthening the Welsh language](#) (August 2024).

¹³ A consortium comprising Early Years Cymru, Clybiau Plant Cymru Kids' Clubs, Mudiad Meithrin, National Day Nurseries Association (NDNA Cymru) and PACEY Cymru.

¹⁴ Data provided directly by Mudiad Meithrin.

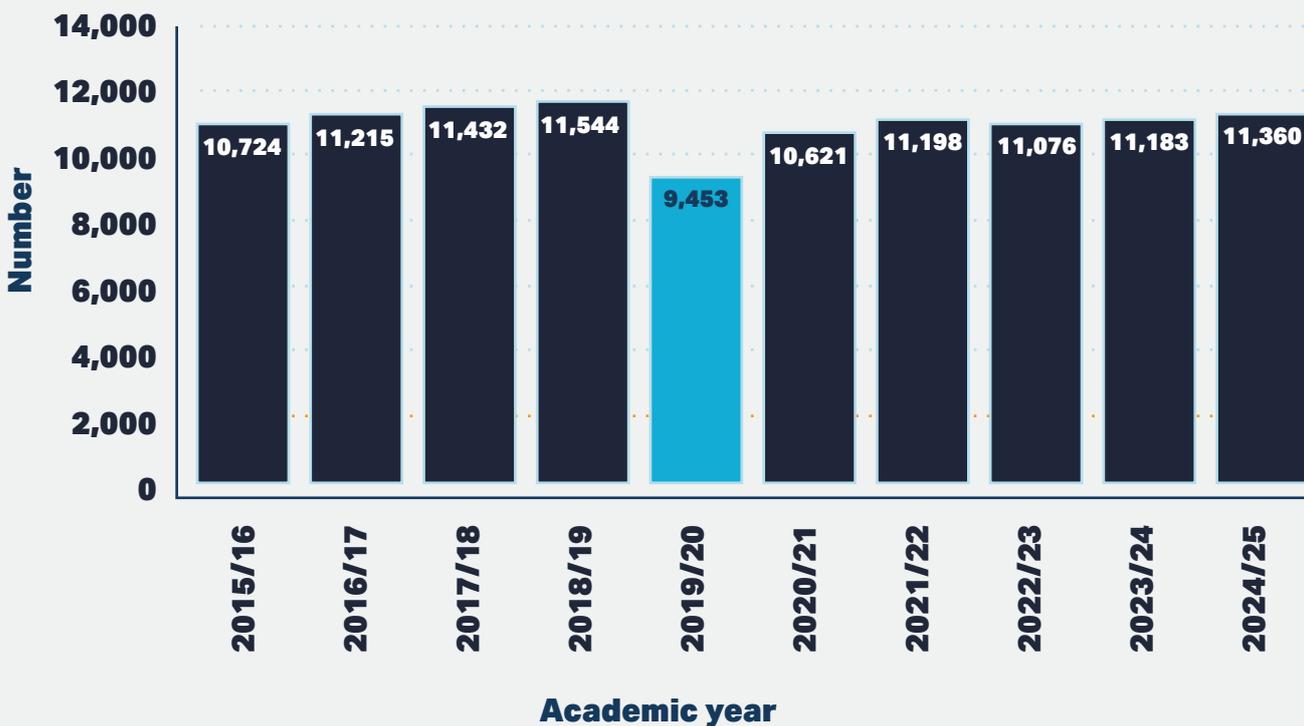
Chart 4: Number of cylchoedd meithrin and number of cylch meithrin settings



(Source: Mudiad Meithrin)

Chart 5 shows an increase in the number of children attending cylchoedd meithrin during the same period, from 10,724 in 2015/16 to 11,360 in 2024/25.¹⁵

Chart 5: Number of children attending cylchoedd meithrin, per year



(Source: Mudiad Meithrin)

¹⁵ It should be noted that settings closed during part of the 2019/20 academic year due to the COVID-19 pandemic and there was a marked drop in attendance at cylchoedd. It should also be noted that the population of children aged 0–4 declined during the same period. For example, in 2015 Welsh Government projections stated that there were 174,270 children aged 0–4 in Wales. The corresponding figure for 2023 was 150,196.

Mudiad Meithrin provided 9,276 hours of weekly childcare in 2024/25, an increase of 1,679 hours of care since 2019/20.¹⁶ According to its Strategic Plan for 2025–30, 77.5% of children attending Mudiad Meithrin provision come from families where English is the language of the home.¹⁷ With **88.8% of children progressing from cylch meithrin to Welsh-medium education in 2024/25,**¹⁸ these figures highlight the importance of the Welsh-medium early years sector in creating new Welsh speakers.

Mudiad Meithrin also continued to lead the **Cam wrth Gam training scheme** during the reporting period. The scheme offers valuable opportunities for workers in the sector to gain childcare qualifications through the medium of Welsh. Level 3 or 5 courses are offered in further education colleges, and Mudiad Meithrin also leads a Cam wrth Gam Scheme in secondary schools. The Urdd, Coleg Cymraeg Cenedlaethol and Mudiad Meithrin continue to provide a **Welsh-medium apprenticeship scheme** for the childcare and early years sector, and the National Centre for Learning Welsh provide Welsh language training for the childcare and early years sector through the Camau scheme. Around 700 individuals from the sector learn Welsh each year through this scheme, supported by a network of Cwlwm officers.

Mudiad Meithrin is also **extending its influence through the Plethu** scheme, established in 2022 following discussions with Early Years Wales. Having started by working with members of Early Years Wales and expanding to include other childcare providers, the scheme supports **English-medium or bilingual settings to transition into Welsh immersion settings.** Increasing the number of such settings is a key objective of Mudiad Meithrin's Strategic Plan.

The position of the Welsh language across the early years sector

A positive vision for the Welsh language is evident across the whole sector. Cwlwm partners have issued a joint statement calling for a clear pathway that enables every child to become a Welsh speaker.¹⁹ To support this, they are working collaboratively to upskill the early years workforce. **Since 2021 more than 2,300 early years practitioners have undertaken Welsh language training at various levels** and Cwlwm has provided over 500 resources to support them. Cwlwm also operates a Welsh Promise scheme, through which it has **worked with over 170 childcare settings** to assess how they use the Welsh language and develop an action plan to **move settings along the language continuum towards offering genuinely bilingual or Welsh language provision.** This work lays an important foundation for the implementation of the Welsh Language and Education Act, which will require engagement from the whole education sector – not only the Welsh-medium sector – in order to succeed.

¹⁶ Data provided directly by Mudiad Meithrin.

¹⁷ Mudiad Meithrin, *Meithrin iaith: Strategic Plan 2025-30*.

¹⁸ Data provided directly by Mudiad Meithrin.

¹⁹ *Cwlwm partners call for a pathway that enables every child to grow as a Welsh speaker* | cwlwm (Accessed December 2025).

Despite the importance of these developments in the early years sector, several recent reports highlight persistent challenges in Welsh-medium childcare. For example:

- The ***Independent Review of Childminding*** notes that the overall availability of Welsh-medium childcare provision has increased in recent years, mainly due to an increase in children’s day care capacity. However, the availability of Welsh-speaking childminders has decreased significantly, which is likely to limit the choice of childcare and reduce access to Welsh language provision for parents in some parts of Wales.
- The ***Evaluation of the Childcare Offer for Wales: Year Five (September 2021 to August 2022)*** points to the challenges of recruiting and retaining staff in Welsh-medium settings.
- The ***Overview of key themes in the 2022 to 2027 Childcare Sufficiency Assessments*** identifies a widespread perception among local authorities regarding the lack of Welsh-medium childcare settings. It is noted that this is a general problem, but that it is particularly acute in the context of childminders, reflecting the findings of the independent review noted above. Another difficulty is inadequate care hours, with Welsh-medium childcare providers generally offering sessional care. And this despite the fact that the number of hours offered by *cylchoedd meithrin* has increased in recent years. Additionally, some local authorities reported insufficient access to Welsh-medium provision for children with Additional Learning Needs.
- The Welsh Government commissioned **childcare and play workforce mapping**, and two reports on the outcomes of the work were published in 2024. According to the Phase 1 Report,²⁰ of the 90% of registered settings in Wales that responded to the Care Inspectorate Wales Service Self-Assessment Statement in 2023, 15% said Welsh was their main language of service delivery, and a further 10% said Welsh and English were their main language. Overall, 21% of the registered childcare and play workforce were fluent in Welsh, with a further 21% able to speak a fair amount of Welsh. The Phase 2 Report ²¹ warns that a substantial increase in the amount of Welsh-medium childcare and play provision will be required for local authorities to meet the Welsh-medium provision targets outlined in their WESPs. Crucially, one of the **main conclusions of the report is that difficulties in recruiting and retaining Welsh-speaking staff are a major obstacle** to achieving these targets. This is particularly true given that **inadequate salaries and pay is a key factor in the high turnover rates** for the sector as a whole.

Some of the steps the Welsh Government has taken to support the workforce are outlined in the ***Childcare, Play and Early Years Workforce Plan: Review and Refresh*** published in 2024. Since the introduction of the original plan in 2017, the government has provided funding to the Cwlwm consortium lead several projects, including working with further education colleges

²⁰ Welsh Government, **Mapping the childcare and play workforce in Wales: phase 1 report** | GOV.WALES (March, 2024).

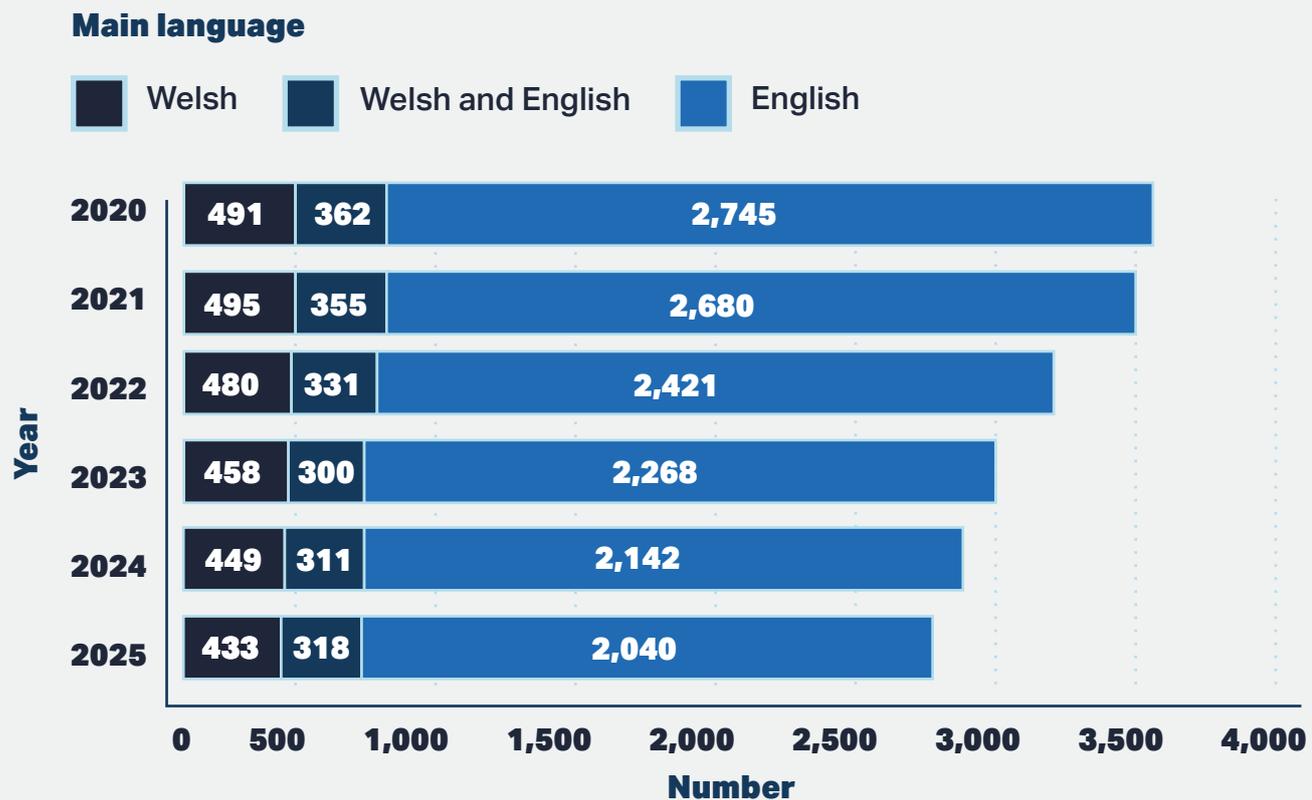
²¹ Welsh Government, **Mapping the childcare and play workforce in Wales: phase 2 report** | GOV.WALES (July, 2024).

and universities to attract more young people into the Welsh-medium childcare workforce, promoting Welsh-medium childcare in ethnic minority communities, and organising Welsh-medium training and support to increase the use of Welsh in early years settings.

Charts 6 and 7 illustrate the number of childcare and play services and the number of childcare and play places according to the main operational language of the service between 2020 and 2025.

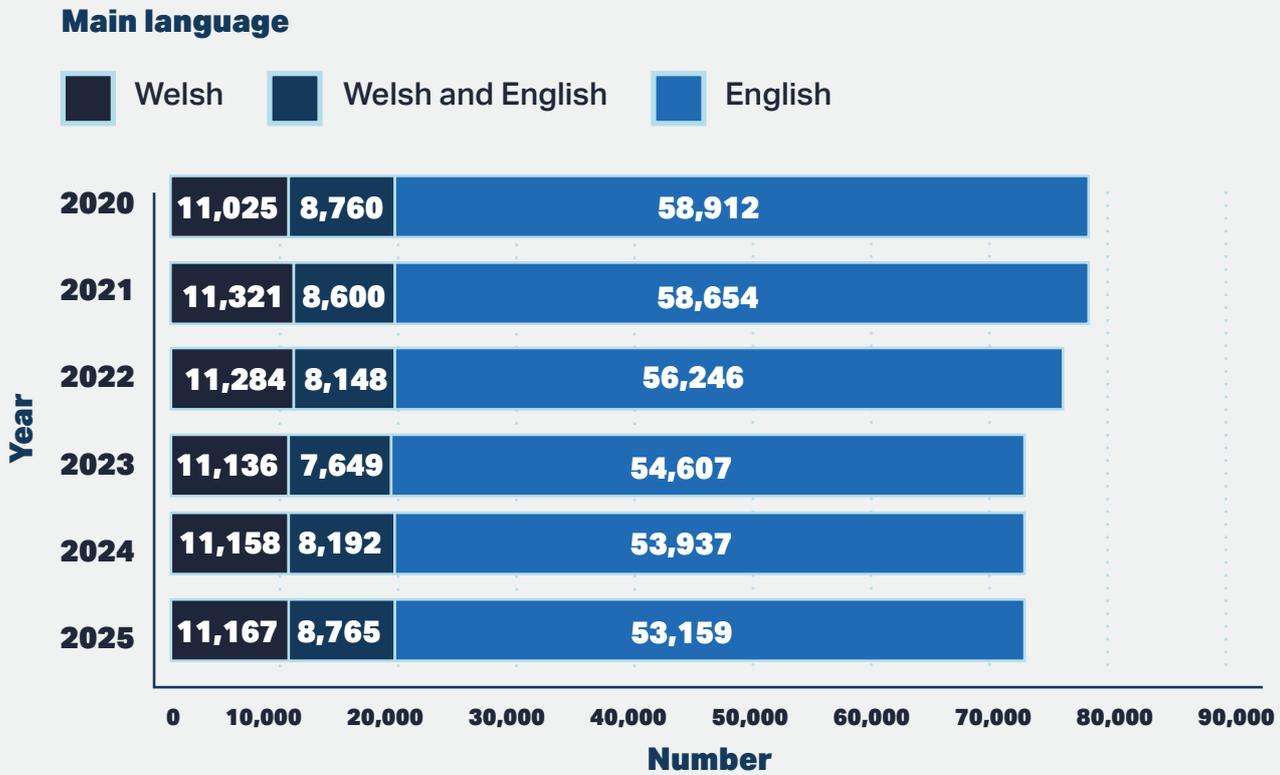
Chart 6 shows a steady decline in the number of childcare and play services over the past five years, and this is also true for Welsh-medium and bilingual services. However, despite the overall reduction in the number of services, the percentage of Welsh-medium services has increased from 13.6% in 2020 to 15.5% in 2025.

Chart 6: Number of childcare and play services by main operational language of the service



As Chart 7 shows, the total number of childcare places has decreased over the past five years. However, **the number of Welsh-medium and bilingual childcare places has risen slightly**. As a proportion of all childcare and play places, Welsh-medium places has increased from 14% to 15.3%.

Chart 7: Number of childcare and play places by main operational language of the service



(Source: Care Inspectorate Wales registration data)

The data clearly shows that there has been very little growth in Welsh-medium or bilingual provision over the past five years, and the majority of childcare and play provision continues to be provided through the medium of English. These figures reinforce the concerns raised in the reports discussed above.

2.3 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

The statistics show that the position of the Welsh language in the early years sector has changed very little, not only during the reporting period, but also in the preceding years. Although there has been some development and progress, **this now needs to be accelerated and expanded significantly to reach the *Cymraeg 2050* targets and achieve the objectives of the Welsh Language and Education Act.** Achieving the growth targets for Welsh-medium education will depend on expanding Welsh-medium childcare and early years provision, ensuring that more children in Wales begin their educational journey through the medium of Welsh.

To achieve this, it will be essential to provide accessible services with sufficient hours of care across the whole of Wales. Consistent, high-quality provision would strengthen **the status of the Welsh language in the early years at a national level, facilitate access to Welsh-medium education, and give every child in Wales a genuine opportunity to develop into a confident Welsh speaker.**

To ensure that the provision of childcare and early education in Wales aligns with the principles of the Welsh Language and Education Act, it will also be necessary to **support and encourage all providers to move along a linguistic continuum.** This will require a comprehensive programme of Welsh-language training to move employees along the continuum of language learning, delivered through flexible and varied models, including intensive learning opportunities. Embedding the Welsh language as a core element of early years provision will be key to ensuring that **every child gets to start their journey to become a Welsh speaker.**

A full programme of Learn Welsh training must therefore be available to the entire workforce, for both trainees and existing staff, building on and extending the current Camau scheme of the National Centre for Learning Welsh in partnership with Mudiad Meithrin.. As in the wider education system, **the main barrier to realising these admirable objectives is the shortage of a bilingual workforce.** As the evidence from the sector shows, staff recruitment and retention is a significant issue, and low wages and the appeal of better-paid work in other sectors, create a particularly challenging context for the sector. These pressures are especially significant given the ambition to expand Welsh-medium provision and support services to move along the linguistic continuum.

Priority



There must be significantly greater investment in developing the Welsh language skills of the early years workforce. This requires expanding the Welsh-language training embedded within the sector's training courses and apprenticeships, and the ongoing professional development available to all workers. To achieve the increase in Welsh-language skills, the recruitment and retention of staff must be facilitated through an overall increase in resources to the sector.

A solid foundation already exists for expanding the Welsh language skills of the workforce, including a Welsh-medium apprenticeship programme, the Cam wrth Gam training scheme and the Camau Welsh language learning scheme. Further **investment in these schemes would strengthen workforce upskilling and enable the expansion of provision** not only within the Welsh-medium sector but also across the English-medium sector, which currently delivers the majority of provision.



A language to
learn and use



16 year-old Yusuf Yassine is a student at Ysgol Gyfun Gymraeg Glantaf. He lives in the Grangetown area of Cardiff and often spends time at the Grange Pavilion there. The Grange Pavilion is a community hub in this multicultural and multilingual corner of Cardiff which provides space for a number of diverse communities and societies and is a popular venue for all kinds of events. Yusuf also attended a Welsh-medium primary school and he thinks that speaking Welsh is very important.



I've been fortunate to have had my education all through Welsh so far, and I feel it has offered me a lot of new opportunities that I wouldn't have had if I wasn't able to speak Welsh. Those opportunities are not only in school, but also outside of school as I socialise and chat with friends and meet new people.

I live in a community where many languages are spoken and when I was younger I learned Arabic, so learning languages and speaking them is something completely natural for me.

If I'm honest, I don't hear a lot of Welsh being spoken where I live, but I definitely feel that people's attitudes towards the language have changed. New Welsh schools have opened in the area, so more people from ethnic backgrounds are having the opportunity to learn the language and taking advantage of that. It feels quite natural now.

After leaving school, I would like to get a job in politics or law. I'd like to stay in Wales if possible, but if I have to move away, I'll make sure I come back to keep my Welsh alive.



3. Statutory education

The majority of young Welsh speakers today are likely to have learnt the language through the education system. It therefore follows that achieving the goal of one million Welsh speakers by 2050 will depend heavily on the success of the education system in creating Welsh speakers over the coming decades.

The trajectory towards a million Welsh speakers is based largely on a substantial increase in the number of people receiving Welsh-medium education, as well as ensuring that a far higher proportion of pupils leave the English-medium and bilingual education system as Welsh speakers. Delivering this ambition will require a significant expansion in the number of teachers who are able to teach through the medium of Welsh.

3.1 Main developments

There is no doubt that the introduction of the **new Curriculum for Wales** was one of the most significant developments in schools over the reporting period. Following the passing of the Curriculum and Assessment (Wales) Act 2021, schools have been busy planning their curricula and preparing for implementation from September 2022. **There is a clear expectation that the Welsh language is a central part of the learning experience of all pupils in Wales**, and one of the key objectives of introducing the new curriculum was to place greater emphasis on the teaching and use of Welsh in English-medium schools. Its introduction is therefore a core element of the effort to ensure that a significantly higher proportion of Welsh pupils leave the education system as fluent Welsh speakers.

Alongside the roll-out of the curriculum in schools, Qualifications Wales and awarding bodies have been responsible for **developing new qualifications**. All new GCSE qualifications and publicly-funded qualifications will be available bilingually. It was also decided to replace the Welsh Second Language qualification with a new Core Cymraeg qualification. The intention is that Core Cymraeg is more challenging and appropriate for learners in the English-medium sector, and will therefore facilitate the movement of pupils and schools along a linguistic continuum by **closing the gap between the Welsh language curriculum in English-medium and Welsh-medium schools**.

An important development to support schools and learners in the context of curriculum development and new qualifications was the establishment of Adnodd in 2022, the body responsible for overseeing and co-ordinating educational resources. The provision of quality bilingual resources will be essential to realise the objectives of the curriculum in terms of developing pupils' Welsh language skills and to enable more schools to move along the linguistic continuum.

Key milestones on the journey towards the Welsh Language and Education Act

2015



Donaldson’s review of the curriculum

Starting the important work of developing a new curriculum for Wales

2017



Publication of the Cymraeg 2050 strategy

Setting a vision and specific targets to expand Welsh-medium education

2019

The Additional Learning Needs and Education Tribunal (Wales) Act 2018

Laying a stronger legislative basis to ensure additional Welsh-medium learning support



2018

The Welsh in Education Strategic Plans Regulations (Wales) 2019

Outcome of a review in 2017 on strengthening the planning framework for Welsh-medium



2021



2021: Curriculum and Assessment (Wales) Act 2021

An Act establishing a statutory framework for the new curriculum for Wales

2021



New guidance on the categorisation of schools by Welsh language provision

Introducing a new system for defining Welsh-medium and bilingual schools

2022

Welsh in Education Strategic Plans in local authorities come into force

Local authority 10-year plans published and implemented



2022

Publication of the Welsh in Education Workforce Plan

10-year plan for developing an increasingly bilingual education workforce

2025



Welsh Language and Education (Wales) Act 2025 receives Royal assent

A historic development that can be considered the culmination of a decade of significant developments in Welsh language and education

As well as dealing with new curriculum development requirements, schools have also had to respond to the significant changes to the Additional Learning Needs (ALN) provision as part of the **implementation of the Additional Learning Needs and Education Tribunal (Wales) Act 2018**. A particularly significant development in this context was the appointment of a national lead for supporting the additional learning provision through the medium of Welsh. Since the appointment of the national lead in 2022 significant steps have been taken to develop more resources and support for ALN through the medium of Welsh.

One of the cornerstones of the Welsh Government's *Cymraeg 2050* strategy is to significantly increase the percentage of pupils in Wales receiving Welsh-medium education. Although the Welsh in Education Strategic Plans (WESPs) framework has been in place for some time, 2019 marked a significant policy shift with the introduction of **the Welsh in Education Strategic Plans (Wales) Regulations 2019**. These regulations ushered in a far more ambitious planning system. The expectation was that local authorities would proactively expand Welsh-medium education, thereby contributing directly to achieving some of the main targets for education in *Cymraeg 2050*. In **2022 the first local authority strategic plans were published under the new system**. This means that all local authorities are now implementing ten-year plans that include firm targets and commitments to expand Welsh-medium education.

Alongside the introduction of the new regulations, the Welsh Government also revised **the guidance on school categorisation according to Welsh-medium provision**. The main aim of this revision was to simplify the linguistic categories, provide greater clarity for parents and pupils, and create a system that facilitated the gradual movement of schools along a linguistic continuum.

There is no doubt that expanding the Welsh-medium education workforce is **one of the most crucial issues in terms of the success of the vision of *Cymraeg 2050***. Our previous 5-year report identified a need to implement a national strategy to develop an increasingly bilingual education workforce. The Government responded positively to those recommendations by publishing the **Welsh in Education Workforce Plan in 2022**. The plan sets out the steps that the Government and its partners will take over ten years to increase the number of teachers and assistants who are able to work through the medium of Welsh and to teach Welsh.

As part of the Co-operation Agreement between Labour and Plaid Cymru in 2021, the Welsh Government committed to introducing a Welsh Language and Education Bill during the lifetime of the Senedd. The passing of the **Welsh Language and Education (Wales) Act 2025** was a hugely significant development and is the culmination of the significant developments that have taken place in terms of the Welsh education planning system over the past decade. The main provisions of the Act include:

- providing a **statutory basis** for *Cymraeg 2050* targets
- **defining the linguistic categories** of schools in regulations

- placing a duty on Welsh Ministers to create a **National Framework for Welsh Language Education and Learning Welsh**.
- Requiring schools to produce and publish **Welsh language education delivery plans**
- establishing a **robust planning and accountability chain** between *Cymraeg 2050* targets, Welsh Ministers' National Framework, strategic plans at local authority level, and school delivery plans
- developing a **code to describe ability in Welsh** as a foundation for defining the linguistic categories of schools, and to support strategic planning at national, local authority, and school level
- **establishing a National Institute for Learning Welsh** to support Welsh learning across the education and lifelong learning system.

Collectively, the provisions of the Act are significant, and address a number of shortcomings within the current planning system. **It is fair to say that the Act marks a historic turning point in the development of the Government's education and Welsh language policy.** For the first time, some of the Government's most important targets and commitments in relation to the Welsh language are set out in legislation.

3.2 The evidence

While there have been significant developments in policy and legislation over the past five years, the statistical evidence does not show comparable progress over the same period.

The main *Cymraeg 2050* education targets are based on the number and percentage of 7-year-olds who are assessed and taught through the medium of Welsh as a first language. As shown in Table 2, the percentage has risen steadily over the past five years, but the increase is far slower than the trajectory anticipated in the *Cymraeg 2050* targets.

Table 2: The number and percentage of Year 2 pupils (aged 7) assessed in Welsh as a first language or taught Welsh as a first language

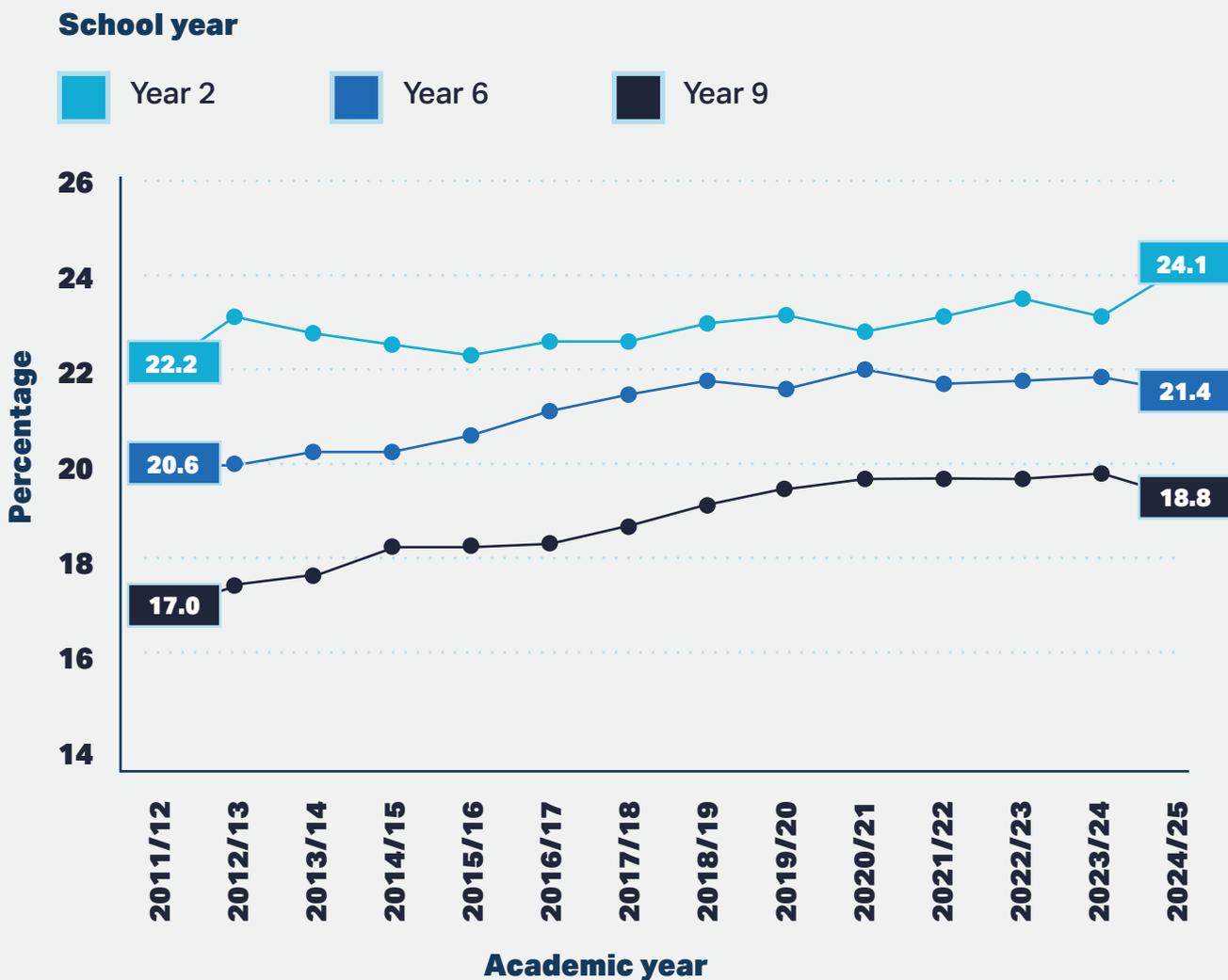
	Baseline 2015/16	2020/21	2021/22	2022/23	2023/24	2024/25	Targets		
							2021	2031	2050
Number	7,760	7,700	7,835	7,960	7,660	7,870			
Cohort	34,765	33,750	33,895	33,960	33,090	32,700			
Percentage	22.3%	22.8%	23.1%	23.4%	23.2%	24.1%	24%	30%	40%

(Source: Pupil Level Annual School Census)

Looking at the data over a longer period, we can see an increase of just 1.9 percentage points in the percentage of pupils studying Welsh as a first language in year 2 over the past 15 years.

As shown in Chart 8, the percentage learning Welsh as a first language in year 9 (end of Key Stage 3) is consistently lower than the percentage learning Welsh as a first language in year 6 (end of Key Stage 2) three years earlier.

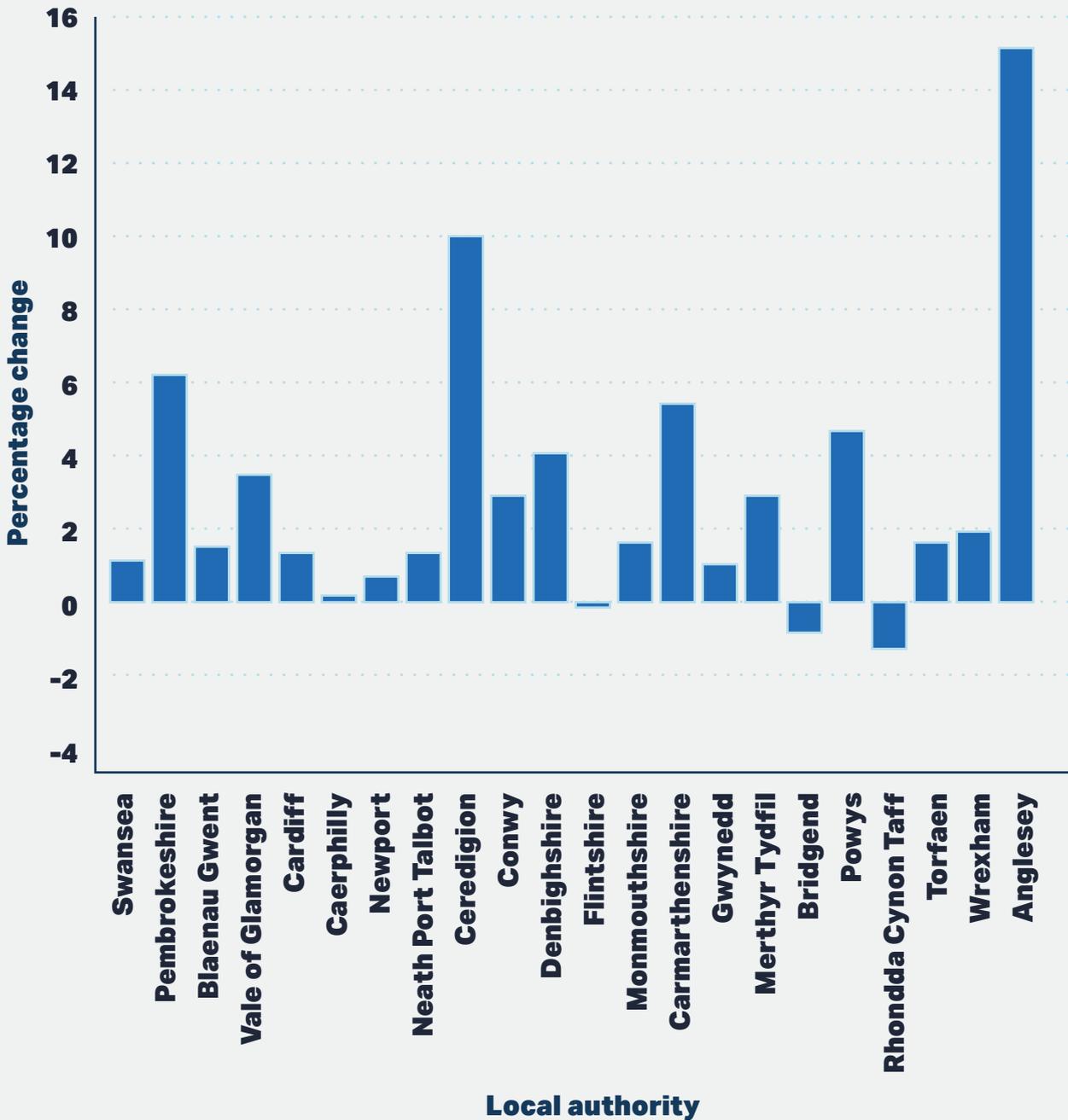
Chart 8: The percentage of pupils in years 2, 6 and 9 assessed or taught in Welsh as a first language



(Source: Pupil Level Annual School Census)

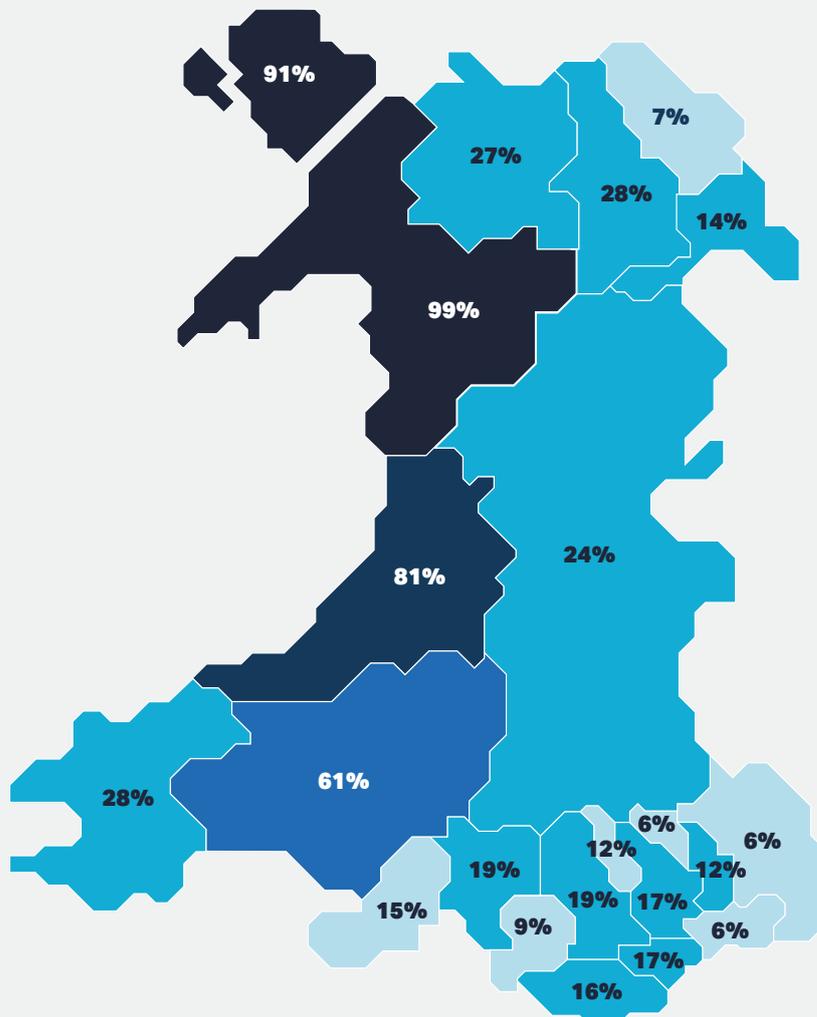
In 2021/22, 21.6% of year 6 pupils were learning Welsh as a first language. Three years later, only 18.8% of the same cohort were studying Welsh as a first language. This highlights the continuing challenge of linguistic progression within Welsh-medium education, particularly as pupils transition from the primary to the secondary sector.

Chart 9: Difference in the percentage of year 2 pupils studying Welsh as a first language between 2011/12 and 2024/25, by local authority



(Source: Pupil Level Annual School Census)

Map 1: The percentage of year 2 pupils studying Welsh as a first language in 2024/25, by local authority



(Source: Pupil Level Annual School Census)

The majority of local authorities in Wales have seen an increase in the percentage of year 2 pupils being assessed through the medium of Welsh. Nevertheless, the increase since 2011/12 is relatively modest in many local authorities, particularly when considered against the level of progress required over the next five years to meet the ambitious *Cymraeg 2050* targets.

In 2023/24, 17.1% of pupils in Wales attended Welsh-medium schools, compared with 16.6% in 2019/20, 15.9% in 2014/15, and 16.3% in 2009/10. In 2023/24, 23.2% of pupils in Wales attended Welsh-medium or bilingual schools.²² This is slightly lower than the figure of 23.4% for 2019/20, and marginally higher than the figure of 22.7% for 2014/15 and 22.5% for 2009/10.

The percentage of pupils studying Welsh first language as a GCSE subject has remained relatively stable over the past five years. Although the percentage of pupils taking Welsh Second Language has increased significantly over the past decade, largely due to the Welsh Government's decision to abolish the GCSE Welsh Second Language short course from summer 2018 onwards, this percentage has decreased over the past five years. The percentage of Welsh pupils not registering for a GCSE exam in Welsh has risen steadily over the same period, from 13.70% in 2019/20, to 19.60% in 2023/24.

²² This data combines numbers attending primary, middle and secondary schools in Wales. Bilingual schools refer to dual stream and transitional schools in the primary sector, and refer to bilingual category schools AB, BB, CB and CH for middle and secondary schools. It is not possible to compare data for 2024/25 as the schools categorisation system according to Welsh-medium provision has changed.

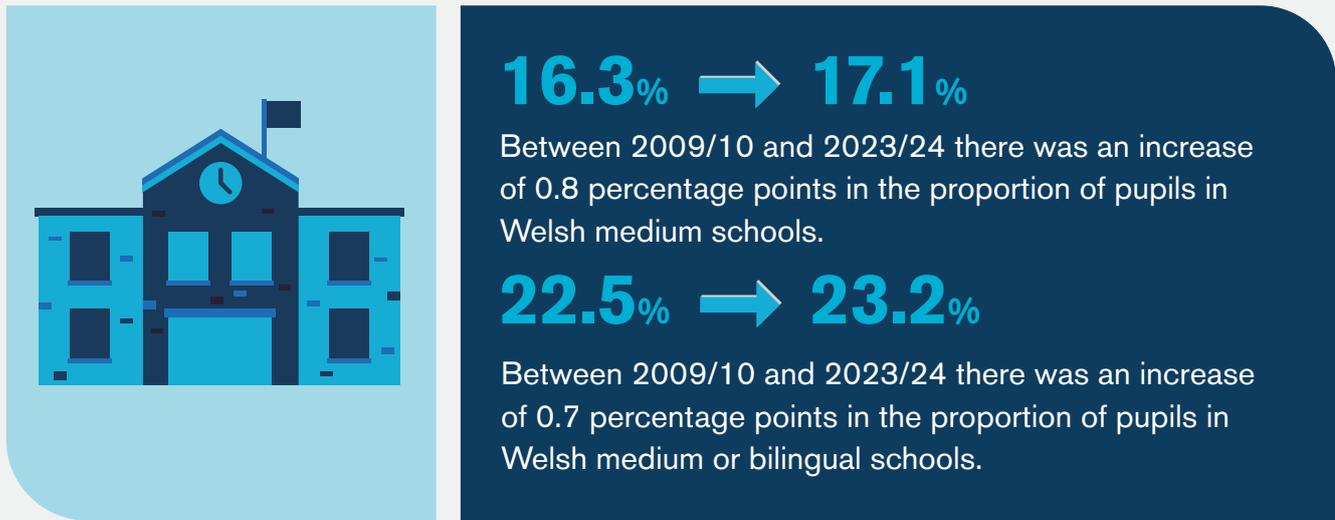
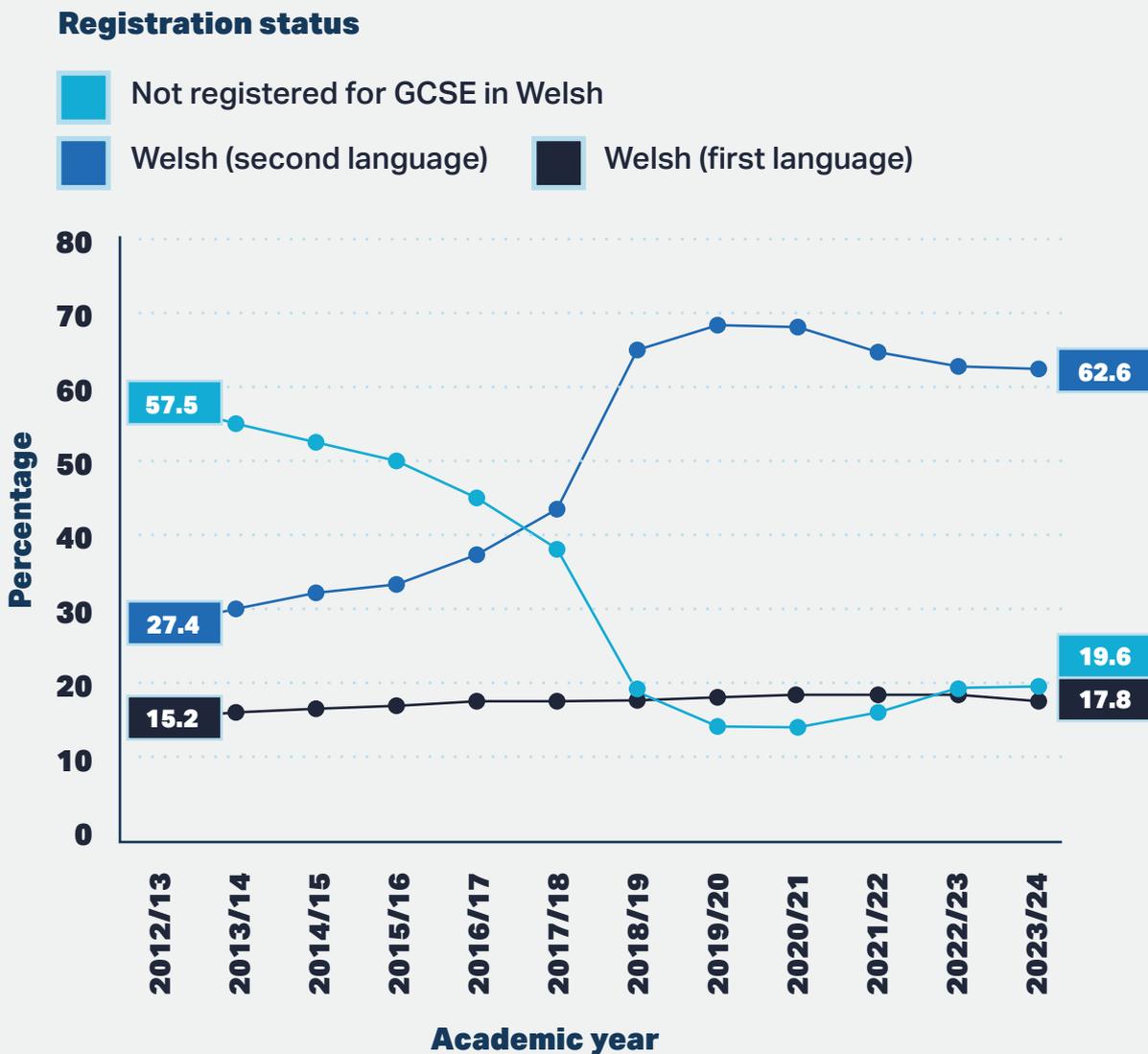


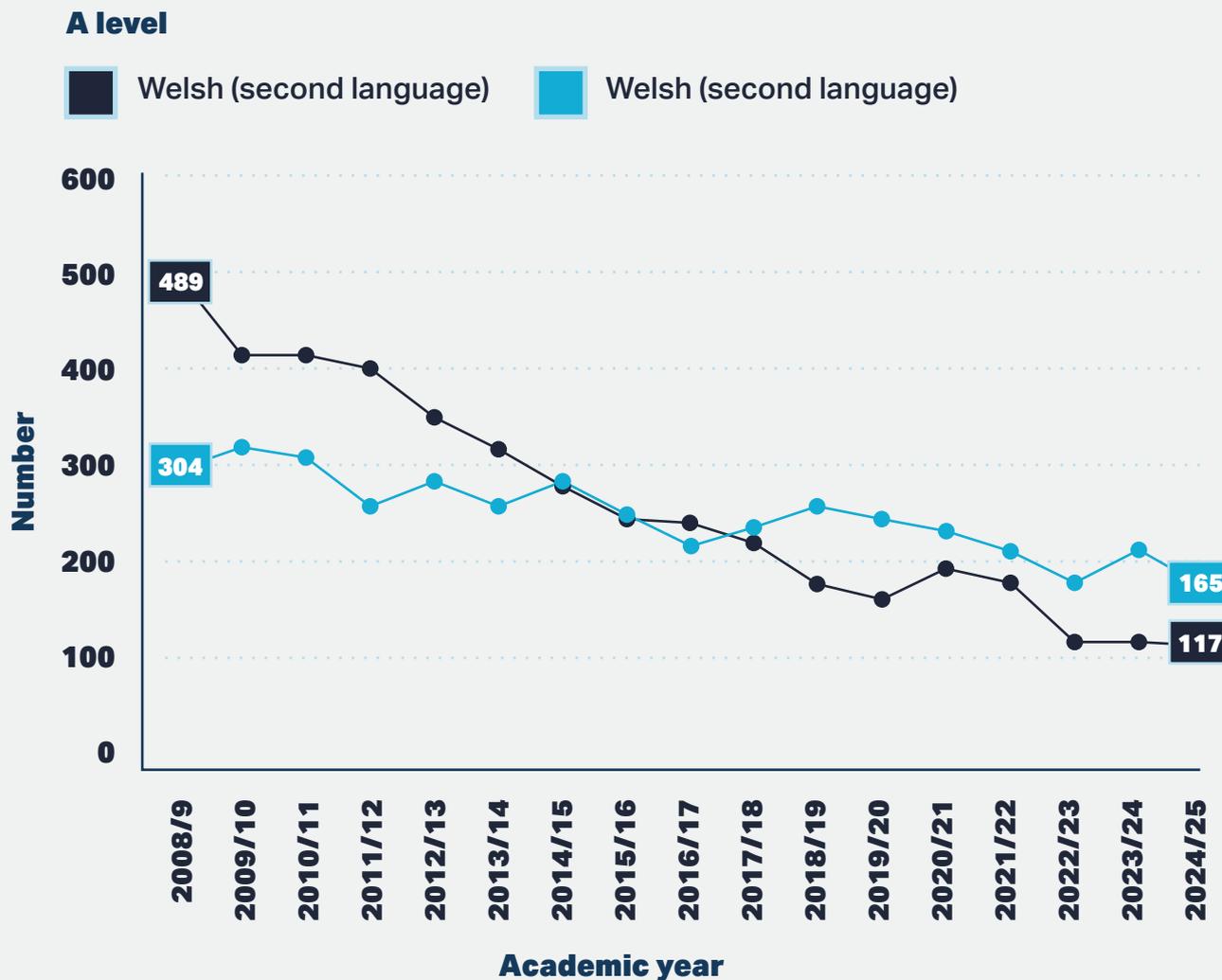
Chart 10: Percentage of year 11 learners registered for GCSE Welsh (first or second language)



(Source: Welsh Examinations Database)

Over the past 15 years there has been a significant reduction in the number of learners choosing to study Welsh A Level and Welsh Second Language A Level.

Chart 11: Number of entries for Welsh A Levels and Welsh Second Language A Levels (17-year-old pupils only)



As Chart 11 shows, in 2008/9 there were 304 learners studying Welsh A Level and 489 studying Welsh A Level Second Language. By 2024/25 the figures had fallen to 165 studying Welsh and 117 studying Welsh Second Language. According to WJEC data, between 2015/16 and 2023/24 the number of centres that registered candidates for Welsh A levels fell from 48 to 45. During the same period, the number of centres that registered candidates for Welsh Second Language A Level fell from 71 to 55.²³

²³ WJEC, [Results Statistics Archive](#) (Accessed December 2025).

One of the most important factors in securing the growth of Welsh-medium education is ensuring that more teachers are able to teach through the medium of Welsh. The *Cymraeg 2050* strategy includes specific targets in terms of the teacher numbers needed for the Welsh-medium sector to achieve the growth targets of Welsh-medium education. As Table 3 demonstrates, the numbers teaching through the medium of Welsh in the primary sector have remained relatively stable over the past decade. During the same period the numbers teaching in the secondary sector have grown steadily. However, the numbers remain significantly below the targets that have been set.

Table 3: Numbers teaching through the medium of Welsh in primary and secondary schools²⁴

	Baseline 2015/16	2020/21	2021/22	2022/23	2023/24	Targets		
						2021	2031	2050
Primary	2,875	2,871	2,884	2,874	2,792	3,100	3,900	5,200
Secondary	2,292	2,395	2,499	2,555	2,549	2,800	4,100	5,400

(Source: Pupil Level Annual School Census)

As Table 4 shows, the number of students on Initial Teacher Education courses training to teach through the medium of Welsh varies from year to year. However, the numbers training to teach in the primary sector appear to have increased over the reporting period but the numbers training to teach in the secondary sector have not increased significantly.

Since 2020, the Open University has offered new part-time and employment-based Graduate Certificate of Education (PGCE) courses for teaching in primary and secondary schools in certain subjects. In 2023/24, for example, 10 students had registered for the Welsh-medium part-time PGCE, all of whom were preparing to teach in the primary sector. In the same year there were 10 Welsh-medium registrations for the employment-based PGCE in the primary sector, and 20 for the equivalent secondary sector route.

²⁴ The figures for secondary schools include teachers who teach Welsh as a subject as well as teachers who teach other subjects through the medium of Welsh.

Table 4: Number of first-year students on ITE courses in Wales training to teach through the medium of Welsh, by school level and year

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Training to teach in Welsh in the primary sector	150	145	110	95	145	190	210
Training to teach in Welsh in the secondary sector	95	90	100	75	90	145	110
Total of those training through the medium of Welsh	245	235	210	175	235	355	325
Total trainees on ITE courses	1,310	1,245	1,200	1,065	1,080	1,680	1,610

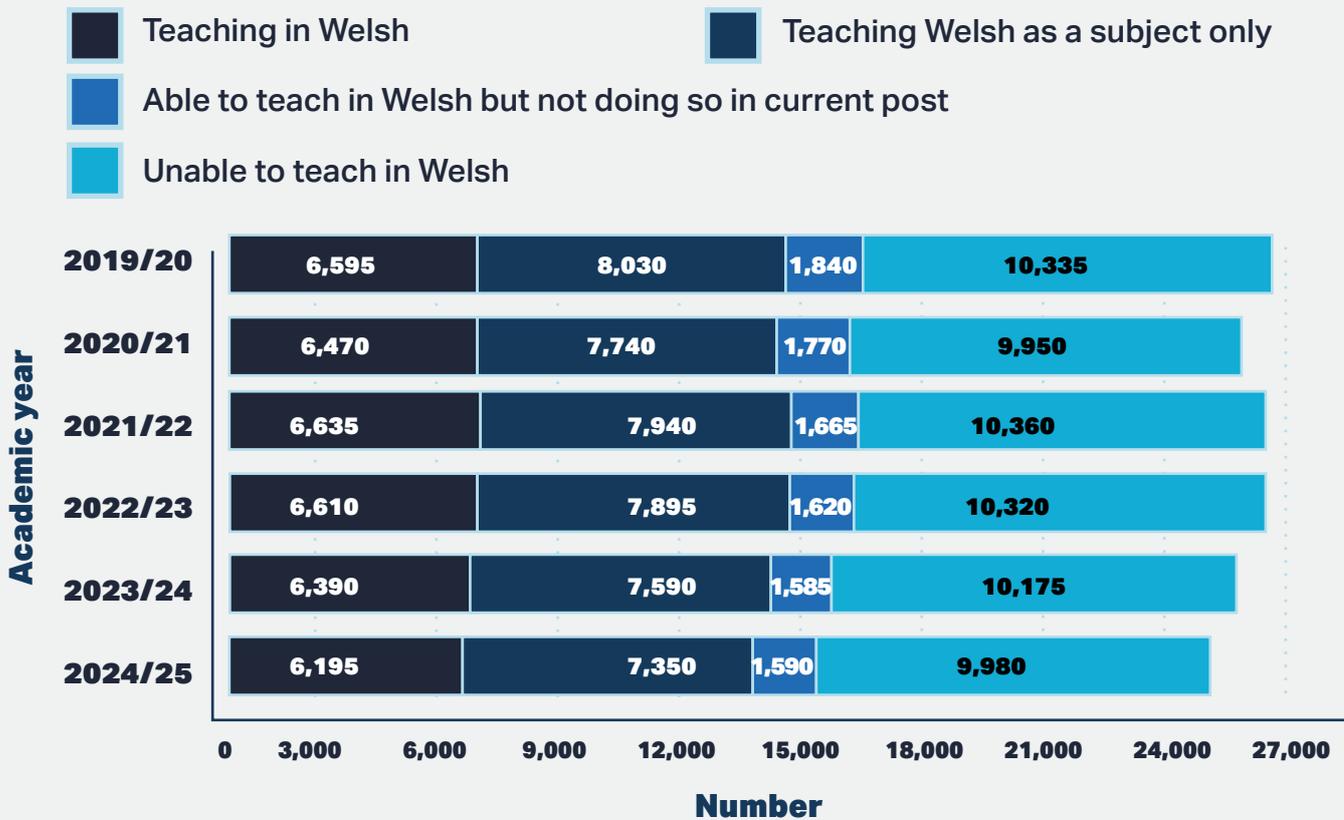
(Source: Higher Education Student Record, Higher Education Statistics Agency)

As part of the implementation of the Welsh in Education Workforce Plan, the Welsh Government has published a detailed data analysis in order to forecast the number of teachers needed to teach Welsh, or teach through the medium of Welsh, to achieve the *Cymraeg 2050* targets.²⁵ The analysis considers a range of factors including numbers currently teaching through the medium of Welsh, numbers of those training to become teachers each year, and the annual numbers of those leaving the profession.

This analysis concludes that **an additional 225 secondary teachers needed each year above those currently recruited through ITE routes and other recruitment methods. For the primary sector an additional 153 teachers are needed annually.** Securing a sufficient number of teachers for the Welsh-medium sector is only one part of the challenge, and achieving the *Cymraeg 2050* targets and the vision of the Welsh Language and Education Act (Wales) 2025 will also require a significant increase in the number of teachers who can teach bilingually in every school. The School Workforce Annual Census shows that the number of teachers reporting that they are able to teach through the medium of Welsh has changed very little since 2019/20.

²⁵ Welsh Government, [Welsh language in education workforce plan: data analysis - 2024 update](#).

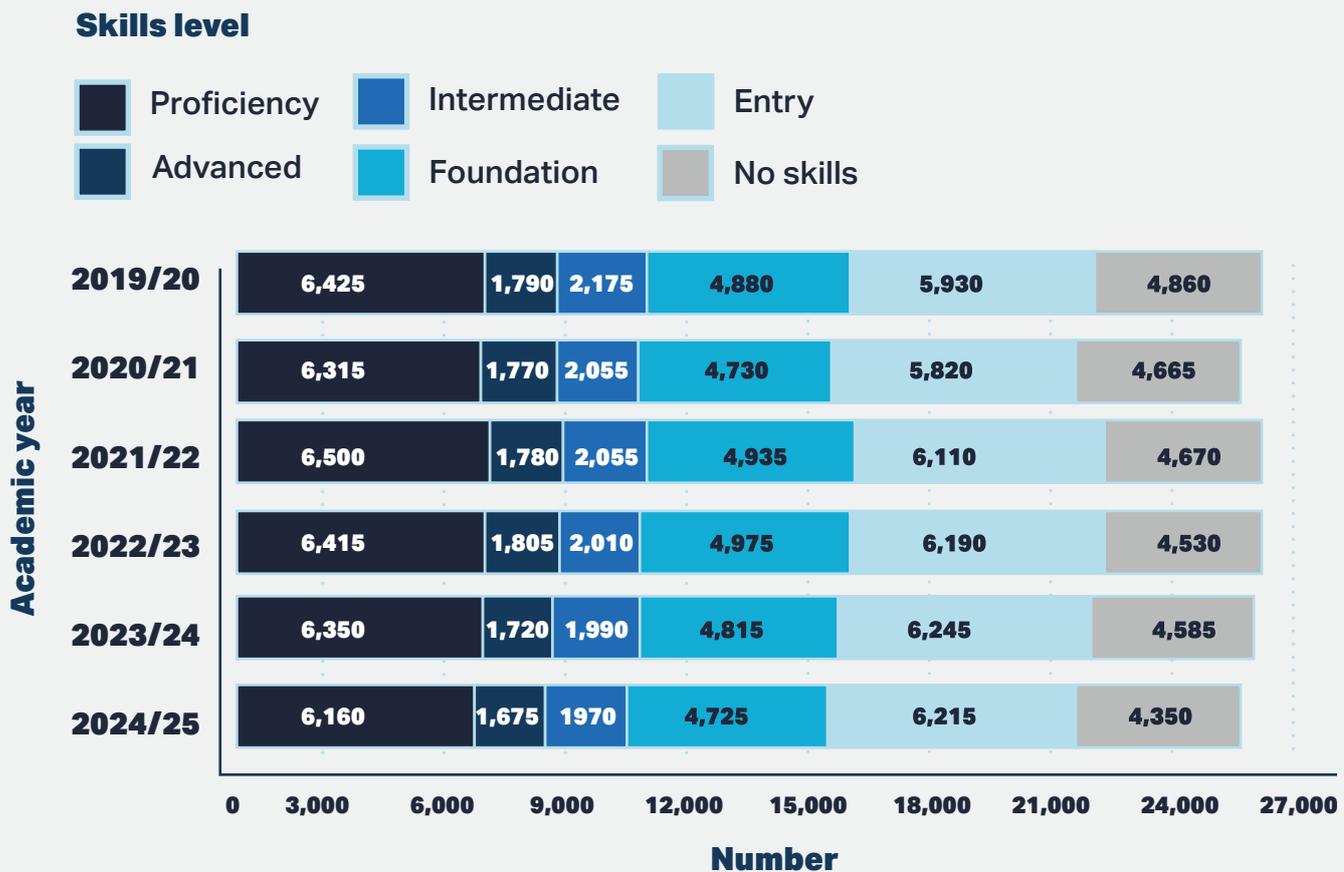
Chart 12: The number of teachers who teach through the medium of Welsh



(Source: School Workforce Annual Census)

The annual census also shows that the Welsh language skills profile of teachers and support staff in Wales has changed very little since 2019/20.

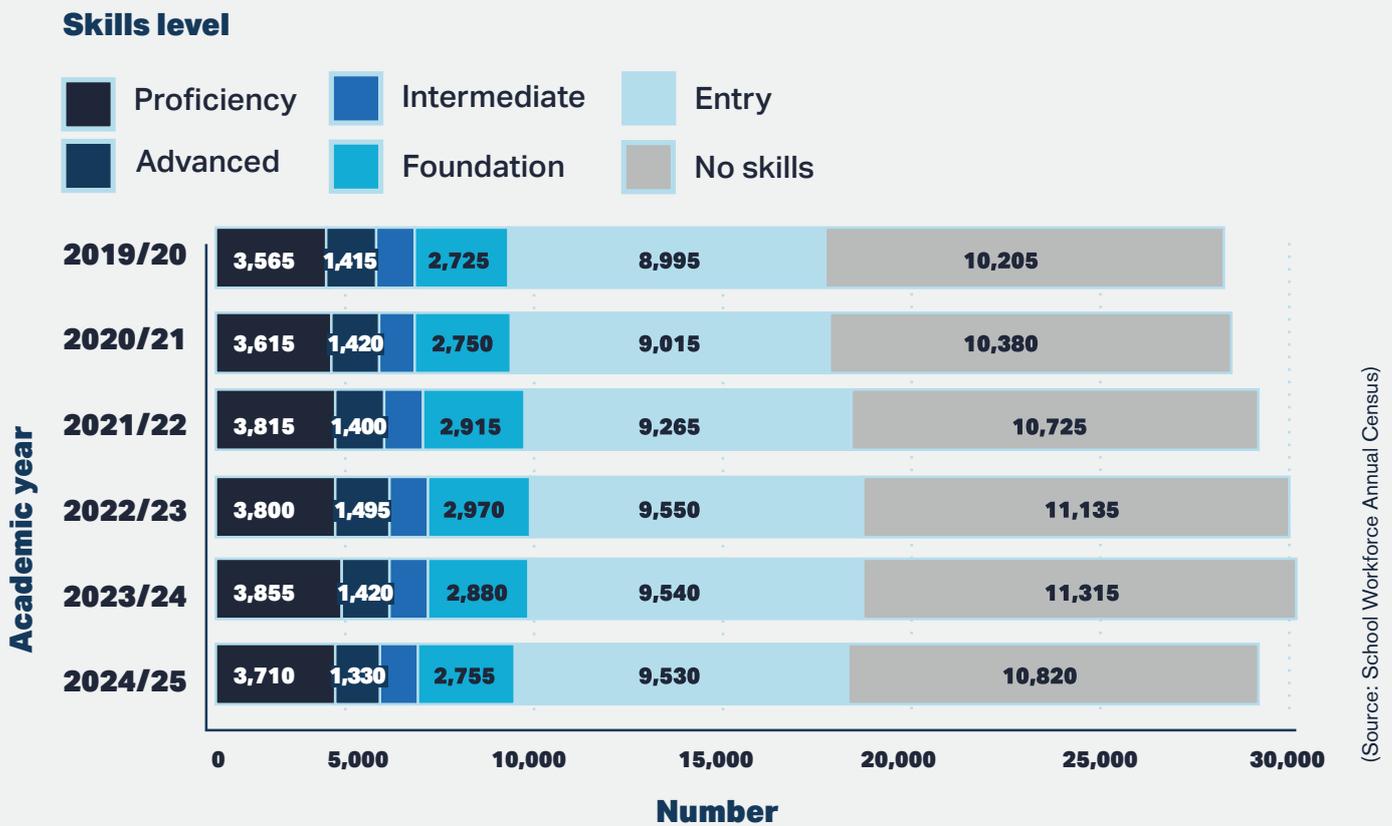
Chart 13: Teachers' Welsh language ability



(Source: School Workforce Annual Census)

One thing that is evident when comparing the language skills profile of teachers and support staff is that a far higher proportion of support staff note that they don't have any Welsh skills; and of those that report having Welsh skills, a greater percentage of those are at the lower levels. For example, in 2024/25, 25% of teachers reported being proficient in Welsh, compared with just 12% for support staff.

Chart 14: Support staff Welsh language ability



3.3 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

An analysis of the statistics over the past five years shows no clear evidence of meaningful progress against the core outcomes of the *Cymraeg 2050* strategy. Although the proportion of learners receiving Welsh-medium education is moving in the right direction, **the increase over the past fifteen years has been slow.**

The statistics regarding the number of learners studying Welsh as an A level subject are a matter of considerable concern, and it is equally clear that **growing the workforce able to teach through the medium of Welsh is a major challenge.**

The message is therefore unambiguous: **significant change is urgently required if we are to ensure that we are on the right track to achieve the long-term targets of *Cymraeg 2050*.**

However, it is important to recognise that the statistical picture from the past five years does not fully reflect the scale of policy development during the same period. The past five years have been a period of significant reform for education in Wales. The Government has introduced a raft of significant policies and legislation to support the Welsh language. By introducing the Welsh Language and Education (Wales) Act 2025 **the Government has set a highly ambitious and coherent vision and direction for the education sector in Wales.** The Act also sets out a clear pathway and robust legislative mechanisms in order to achieve some of the most important targets of the Government's language strategy. From this perspective, the position of the Welsh language today is considerably stronger than it was five years ago.

There is therefore a genuine reason for optimism, and to look at the next five years as a period that could lead to a significant growth in the numbers leaving school as confident Welsh speakers. It is a very exciting period in the history of Welsh education where hugely significant legislation and policy will take root, offering unique opportunities for future pupils and educators. To realise the potential of this innovative programme of policy, it is necessary to ensure that **bold policy and legislation lead to intensive and effective action across the education sector.**

The Welsh Government has set a clear vision and policy direction for the whole sector. There is no doubt that **local authorities and schools, as those with primary responsibility for implementing the Government's vision, will need to respond decisively to the challenge that has been set.** Over the next period all local authorities and schools in Wales will need to take full responsibility for acting in accordance with the vision and principles of the Welsh Language and Education Act.

Of course, the ability of local authorities and schools to act will depend on the support of the education sector as a whole. Adequate funding, suitable qualifications, high-quality resources, and strong support for teachers and support staff will be required. The most important issue of all, however, will be to ensure an increasingly bilingual education workforce. Without this, local authorities and schools will inevitably be unable to implement the Government's vision.

The Welsh Government needs to lead efforts to ensure **a significant increase in the number of teachers able to teach through the medium of Welsh in the future.** The number of current Welsh speakers, and the number of Welsh speakers produced by the current education system, is unlikely to lead to sufficient numbers of teachers and support staff to achieve the objectives of the Welsh Language and Education Act. Without targeted intervention, it is likely that we will see an **endless cycle where a shortage of Welsh-medium teachers will be a continuing barrier to ensuring an increase in the number of individuals leaving school able to speak and use Welsh.**

Priority



The challenge of creating an increasingly bilingual education workforce must be addressed with urgency and ambition. Strong intervention from the Welsh Government is needed to increase the number of learners leaving school as confident Welsh speakers. The Welsh Government should establish a Welsh-language training framework that forms a compulsory part of the training, induction, and professional development of all teachers.

The establishment of Yr Athrofa (The National Institute for Learning Welsh) as part of the implementation of the Welsh Language and Education Act is a crucial development in terms of developing a Welsh-language curriculum and training for teachers. It provides a clear opportunity to build on the **Education Workforce's National Learn Welsh Programme**, currently led by the National Centre for Learning Welsh. This programme already offers diverse and flexible training for teachers and classroom assistants, including sabbatical courses and tutor placement in schools committed to changing language category. To maximise the impact of Yr Athrofa in due course it will be necessary **to embed and expand this training programme so that it is a core part of teacher training and development in Wales.** Achieving this will require a review of the legislation underpinning initial teacher education and the process of qualification and establishment as a teacher, as well as legislation relating to teachers' professional conditions and standards. It will also be necessary to ensure that the National Framework that will be developed as part of the implementation of the Welsh Language and Education Act includes appropriate provisions regarding the development of an increasingly bilingual education workforce, and outlines the key role of local authorities and schools in this context.

Establishing the framework also creates an important opportunity to develop robust monitoring and accountability arrangements, and to provide clarity on the involvement of key partners including ITE providers, local authorities, schools, the Coleg Cymraeg Cenedlaethol, Medr, the Education Workforce Council, Dysgu, and the National Institute of Learning Welsh.

Collectively, these steps are essential to securing an education workforce capable of meeting the needs of a genuinely bilingual education system in Wales.



A language
for education



Bro Hyddgen School in Machynlleth, Powys, is a 3–18 school. Established in 2014, it has traditionally operated as a dualstream school with separate Welsh-medium and English-medium streams, but it is now on the path to becoming a Welsh-medium school.

According to the Headteacher, Dafydd Jones, the decision is a sensible one, although there are challenges to overcome along the way.



One of the main reasons for the change was that we had very small numbers in the English-medium stream, with fewer than 15 children entering the English stream in Year 7 almost every year.

Also, many of the children in the English-medium stream were able to speak Welsh well. An immersion class was established during the former headteacher's tenure, where a group of around 12 pupils received immersion teaching until the end of Year 9. This was a great success, with children from England who had no Welsh at all going on to study GCSEs through the medium of Welsh by Year 11.

A number of practical steps were required along the way, including regular collaboration with the local authority in Powys, developing a consultation plan that allowed everyone to express their views, and promoting the benefits of the change.

There was also a need to correct some inaccurate perceptions, according to Dafydd.





A number of parents were worried that English would not be taught at the school at all, and we needed to emphasise that the idea of bilingualism – and even multilingualism – is an integral part of our vision.

But more importantly, we wanted to promote the benefits that could follow, such as safeguarding secondary education in the area and ensuring viable class sizes, not to mention the advantages for pupils of gaining higher level skills that are valuable when applying for jobs, for example.

Following the introduction of the Welsh Language and Education (Wales) Act 2025, more schools are expected to follow Bro Hyddgen's example. However, Dafydd emphasises the importance of establishing the right infrastructure to ensure success.



The Act is certainly extremely positive and shows a clear direction for education in Wales which will ultimately strengthen the position of the Welsh language. But the vision will not be realised without a dedicated workforce. I have specific examples at Bro Hyddgen of the challenges associated with appointing Welsh-medium teachers, and that can undoubtedly have a significant impact on the aims of the Act. We need to see clear plans for how we can succeed with that, but I am confident that it is possible

Dafydd remains optimistic about the future and is encouraging others to follow a similar path to Bro Hyddgen.



My message to others is very simple – go for it. Through purposeful collaboration and consultation, it is possible to get the job done, and the journey will be worthwhile. As a teacher, nothing gives me more satisfaction than seeing the children succeed, so why wouldn't we give them the best possible foundation to enable them to do that?

4. The tertiary education sector and lifelong Welsh learning

One of the main challenges facing the Welsh language today is ensuring that more young people retain, develop and actively use their Welsh language skills after leaving school. The tertiary education sector and the lifelong Welsh learning sector both have a crucial role to play in addressing this challenge.

The tertiary education sector acts as an essential bridge between statutory education and the world of work and increasing opportunities for learners to maintain and develop their skills while continuing their education or training is vital. Not only does it offer opportunities to build linguistic confidence, it can also shape individuals' perceptions of the importance of the language in the context of the workplace in Wales. This in turn can influence broader patterns of language use.

Increasing the use of the Welsh language in the workplace has been identified as a key priority for strengthening the position of the Welsh language over the next five years. A key part of this will be to ensure that the tertiary education sector creates a workforce with adequate Welsh language skills to meet rising demands, and that this workforce is strategically distributed across and within different organisations. It will also require broadening opportunities for people to begin learning Welsh, as well as supporting those who already have some Welsh to further develop their skills throughout their lives.

4.1 Main developments and evidence

The further education and work-based learning sector

Over the past decade there has been an increasingly strategic focus on developing Welsh language provision in the further education and work-based learning sector. The main driver in this context was the publication of a Review of the Activities of Coleg Cymraeg Cenedlaethol in 2017. Following the publication of the review, **it was decided to extend the Coleg's strategic planning role to further education and work-based learning** as well as the higher education sector. The *Welsh-medium Action Plan for Further Education and Apprenticeships* published in 2019 has been the basis for Coleg Cymraeg Cenedlaethol's work in further education and apprenticeships over the past five years.²⁶

As part of the Co-operation Agreement between Labour and Plaid Cymru in 2021, there was a **commitment to invest further in Coleg Cymraeg Cenedlaethol to increase the proportion of apprenticeships and Welsh-medium further education**. This funding has enabled the Coleg to develop a programme of development grants for FE colleges and apprenticeship providers. The organisations use the grants to expand Welsh-medium provision by funding additional tutors, establishing subject networks, developing resources, and sharing good practice in priority areas such as health and care, early years care, public services and sport and leisure.

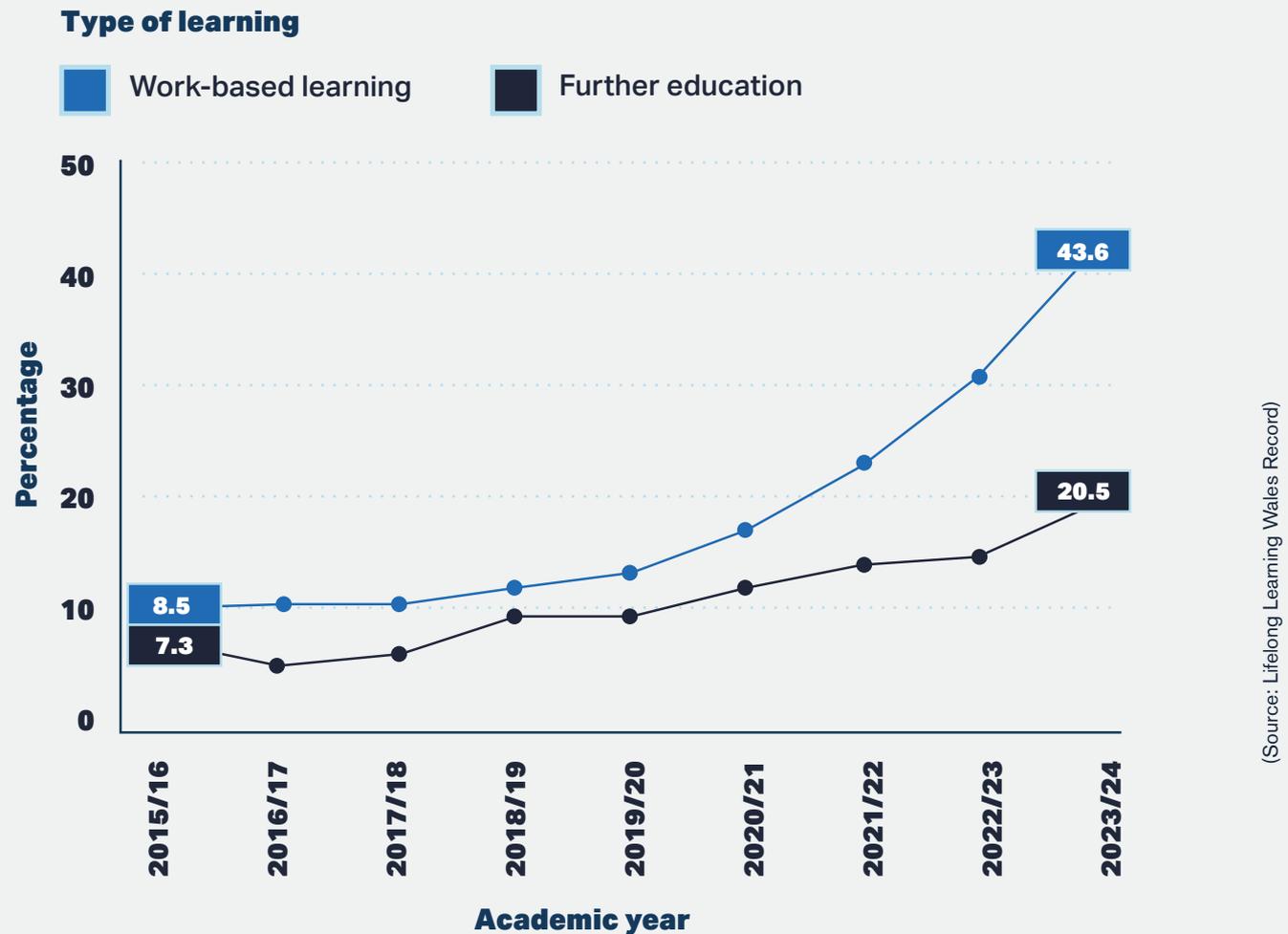
Alongside this, additional investment has been directed to National Centre for Learning Welsh to expand Learn Welsh provision to young people aged 16–25. This has enabled the Centre to develop a programme of free Welsh-language learning opportunities for young people including those in schools, Further and Higher Education colleges, apprenticeships and through extra-curricular activities such as the Duke of Edinburgh Awards, or outdoor courses. It has also supported the integration of Welsh-language learning into tertiary education courses in priority areas such as childcare, health and care and police work.

As well as providing development grants to expand further education provision and apprenticeships, there has also been **additional investment to enable more staff in the sector to receive Welsh language training**. Since 2018, the National Centre for Learning Welsh in partnership with the Coleg Cymraeg Cenedlaethol has been running a Further and Higher Education Welsh learning programme which offers bespoke courses for staff in the sector.

Collectively, these developments have undoubtedly contributed to an increase in the number of learners studying at least part of their courses through the medium of Welsh within the further education and workbased learning sectors

²⁶ Coleg Cymraeg Cenedlaethol, *Towards Cymraeg 2050: A million Welsh speakers. Welsh-medium Action Plan for Further Education and Apprenticeships* (Accessed December 2025).

Chart 15: Percentage of learning activities carried out in Welsh or bilingually, by type of learning and academic year

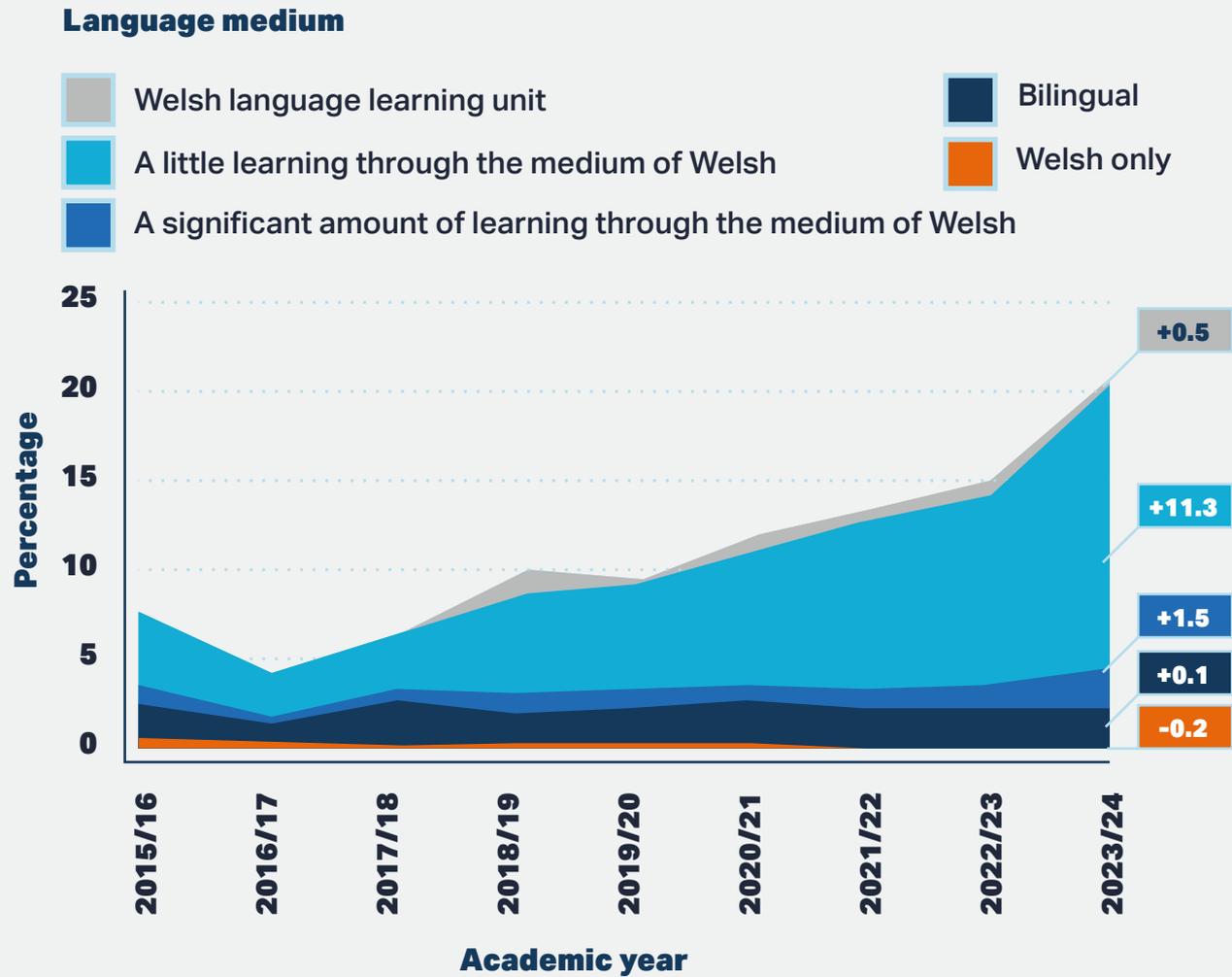


Although there has been a significant increase in the number of learners studying partly in Welsh, it is important to recognise that this growth is driven largely by an increase in teaching activities which include ‘a small amount of Welsh-medium learning’.

As shown in Chart 16, the percentage of learning activities in further education involving ‘a small amount of Welsh-medium learning’ has increased from **3.9% in 2015/16 to 15.2% in 2023/24, an increase of 11.3 percentage points**. This category represents teaching activities where the use of Welsh is restricted to oral communication or to a small component of the learning activity. There was also an increase in the percentage of teaching activities involving ‘a significant amount of Welsh-medium learning’, i.e. an activity where spoken and written Welsh are used in many parts of the learning activity and where the assessment is predominantly in English.

There has been little change over the past decade in the ‘Welsh-medium’ and ‘bilingual’ categories. There was a decrease in the percentage of Welsh-medium learning activities, from **0.3% in 2015/16 to 0.1% in 2023/4**. There was a slight increase in the percentage of bilingual learning activities, from **2.3% in 2015/16 to 2.4% in 2023/24**.

Chart 16: Welsh-medium or bilingual learning activities in further education, by language medium of provision, excluding work-based learning²⁷

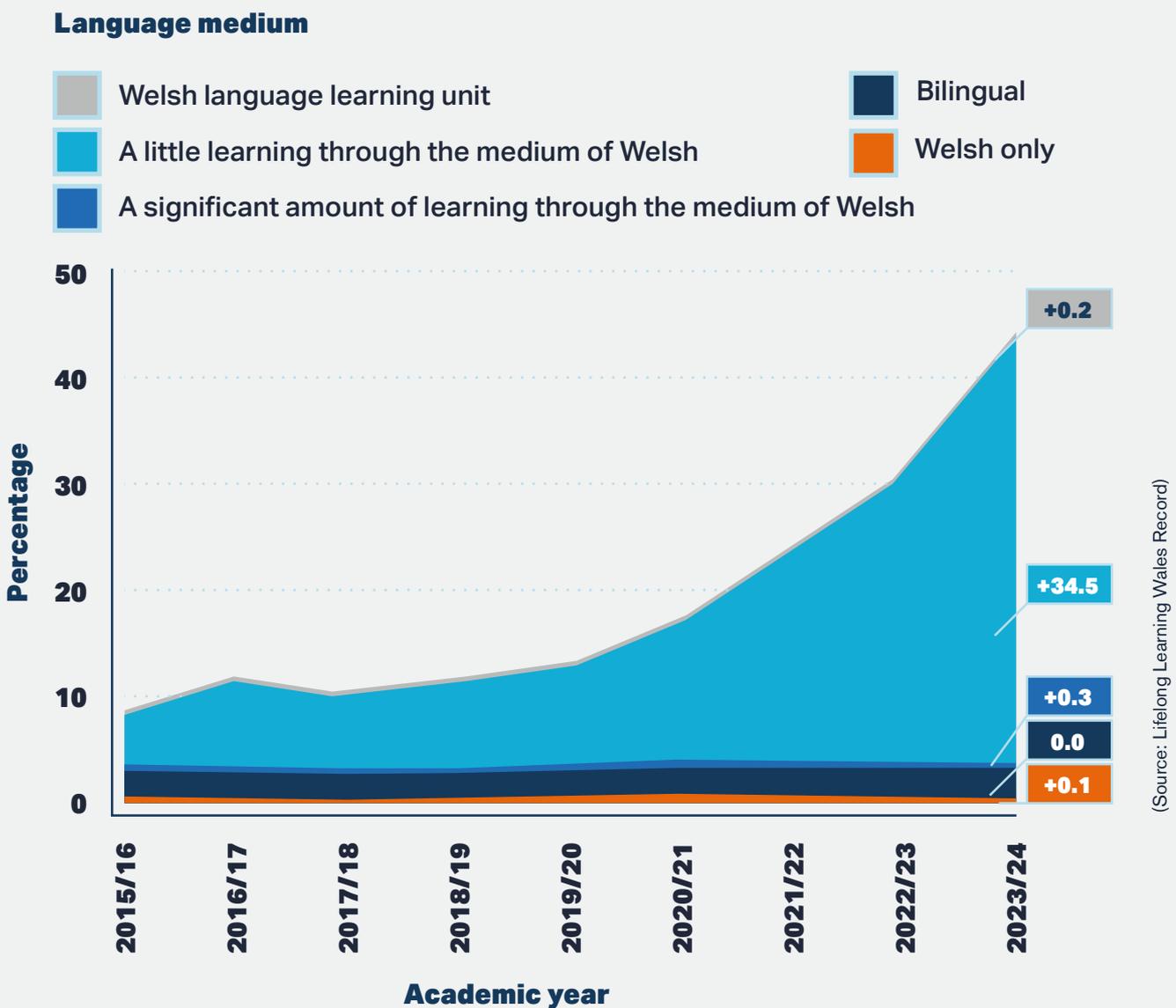


(Source: Lifelong Learning Wales Record)

²⁷ The figures on the right-hand side of the graph show the increase/decrease in the percentage of activities in this category between 2015/16 and 2023/24.

The situation is effectively the same in work-based learning, where there has been little change in the proportion of learning activities categorised as Welsh-medium, bilingual, and a significant amount of Welsh-medium learning. However, there has been a very substantial increase in the percentage of learning activities involving ‘a small amount of Welsh-medium learning’.

Chart 17: Welsh-medium or bilingual learning activities in work-based learning, by language medium of provision²⁸



The data also shows that a very large number of fluent Welsh speakers do not study through the medium of Welsh at all.

As shown in Chart 18, with the exception of learning activities involving ‘a small amount of Welsh-medium learning’, there has been very little change in the proportion of learning activities

²⁸ The figures on the right-hand side of the graph show the increase/decrease in the percentage of activities in this category between 2015/16 and 2023/24.

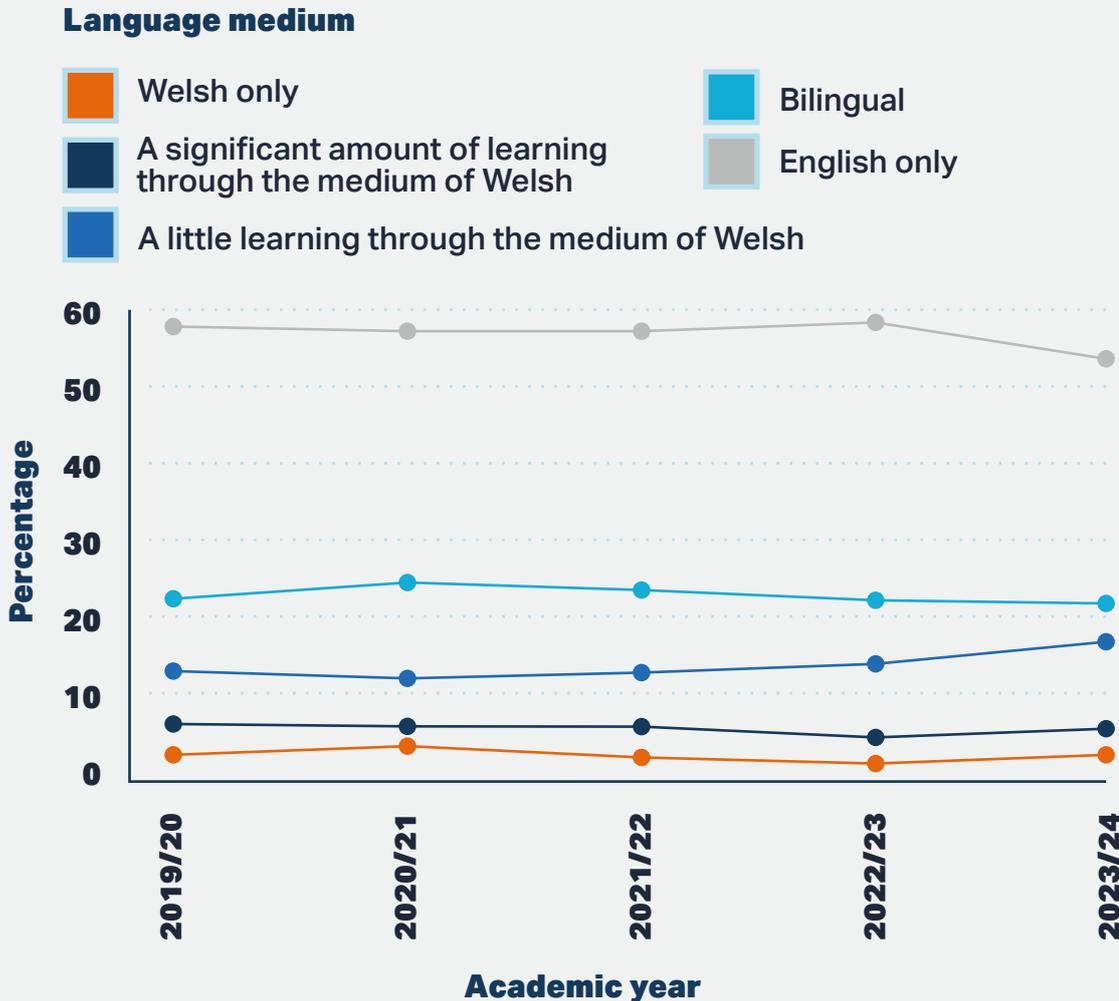


Of the **35,800** fluent Welsh speakers in further education in 2023/24, **20,550** of them were studying through the medium of English. Over half of all fluent Welsh speakers study through the medium of English.

delivered in Welsh or bilingually to fluent Welsh speakers over the past five years.

Chart 18: Percentage of learning activities undertaken by fluent Welsh speakers in further education and work-based learning between 2019/20 and 2023/24, by language medium of learning

While it is difficult to directly compare data from the statutory sector with data from the tertiary education sector, at a general level data from the statutory sector and the tertiary education



(Source: Lifelong Learning Wales Record)

sector highlight the **notable decline in the numbers studying a substantial proportion of their education through the medium of Welsh in the post-16 sector compared to the statutory sector**. For example, in 2021/22 18% of Year 11 pupils in Wales were registered for GCSE Welsh First Language. 71% of these pupils were registered for at least 5 other Level 1 or 2 qualifications through the medium of Welsh.²⁹ Welsh Government statistics on Welsh-medium and bilingual learning activities in post-16 education in 2021/22 show that 5.3% of learning activities were carried out through the medium of Welsh.³⁰ Recent data shared by Medr shows that the percentage of learning activities in post-16 education undertaken through the medium of Welsh fell to 4.4% in 2023/24. The data also indicates that the majority of this Welsh-medium post-16 provision continues to be delivered in the sixth form in schools. In 2021/22 15.2% of Welsh-medium learning activities took place in sixth form in schools, while the figure was 0.2% for further education, and 0.5% for work-based learning.³¹

The data also shows that the **proportion of learners progressing to sixth form in schools has fallen from 42% in 2018/19 to 37% in 2024/25**. The proportion of learners choosing to attend further education colleges has increased from 48% to 56% in the same period.³² Welsh Government data also shows that the numbers attending sixth form in Welsh-medium and bilingual schools have been steadily decreasing over the past decade.³³ This is despite the fact that the number of learners progressing from Year 11 to tertiary education has increased steadily since 2018/19.³⁴ Collectively, these trends mean that fewer learners are continuing in sixth forms, where Welsh-medium provision is strongest, and more are entering the further education sector, where Welsh-medium provision is far more limited.

The higher education sector

Beyond the further education and work-based learning sector, **Coleg Cymraeg Cenedlaethol has continued to support Welsh-medium provision in the higher education sector through a programme of targeted grants**. The Coleg does not fund lecturer posts directly but rather provides subject grants and incentive grants to support universities in developing modules and courses in Welsh.

Coleg Cymraeg Cenedlaethol's undergraduate scholarship scheme continues to offer grants to students studying a proportion of their courses through the medium of Welsh. The Coleg also **funds around 10 research scholarships per year**, enabling postgraduate students to undertake PhDs through the medium of Welsh. These research scholarships have been an important mechanism for **nurturing the next generation of Welsh-medium lecturers**.

Although the number of students studying through the medium of Welsh in the higher education sector has grown significantly since Coleg Cymraeg Cenedlaethol was established in 2011, the

²⁹ Pupil Level Annual School Census – see summary in [Cymraeg 2050 Annual Report, 2022-23](#).

³⁰ Welsh Government, [Ad-hoc statistical requests: 19 to 30 June 2023 | GOV.WALES](#) (July 2023).

³¹ Again it should be stressed that there are differences between the way the data is recorded in schools compared with the further education sector.

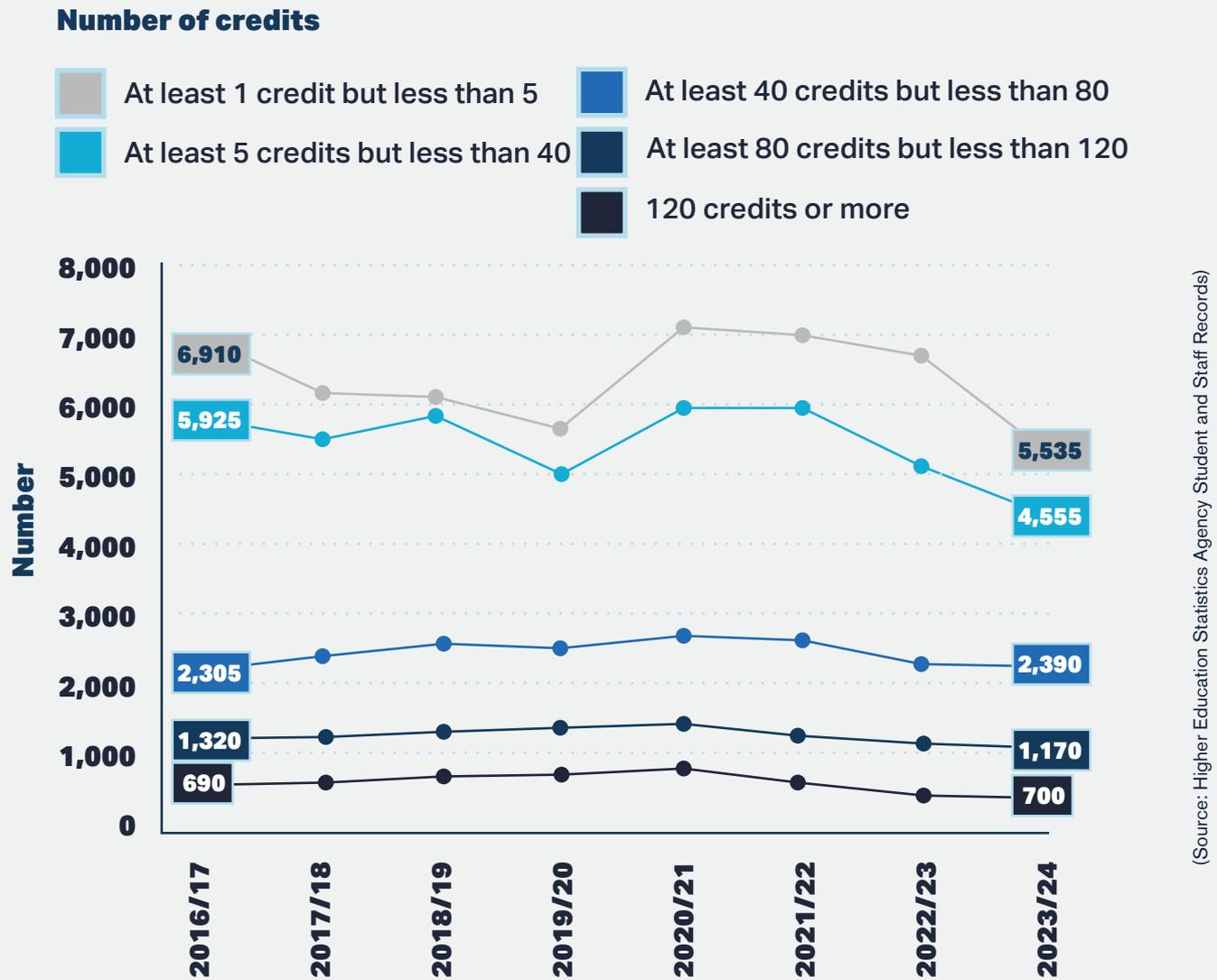
³² Medr, [Progression from Year 11 to tertiary education, August 2017 to January 2025](#) (February 2025).

³³ Welsh Government, [Ad-hoc statistical requests: 11 to 22 August 2025 | GOV.WALES](#) (September 2025).

³⁴ Medr, [Progression from Year 11 to tertiary education, August 2017 to January 2025](#) (February 2025).

situation has remained relatively stable over the past five years, with some decline by 2023/24.

Chart 19: Number of students studying through the medium of Welsh at universities in Wales, by number of credits³⁵



The numbers of students studying through the medium of Welsh has fallen across all categories over the past three years, and this decline is also evident when calculated as a proportion of all students.³⁶ It is worth noting, however, that the percentage of Welsh speakers choosing to study at least 5 credits or at least 40 credits through the medium of Welsh has remained relatively stable over the reporting period.

According to 2023/24 data,³⁷ around 30% of students who were fluent Welsh speakers studied at least 1 credit in Welsh. **This means that there are a significant proportion of fluent**

³⁵ The percentages are based on all enrolments that year.

³⁶ It should be noted that Medr warns that there is potential discrepancy between providers in terms of how they return data on Welsh-medium modules, including how Welsh-medium modules are identified and in terms of how percentages taught through the medium of Welsh are calculated. This may be partly due to changes in the number of credits studied in Welsh. Medr and the Coleg Cymraeg Cenedlaethol are working with providers to improve the consistency of this data.

³⁷ Medr, [Welsh in Higher Education, 2023/24](#) (27 November 2025).

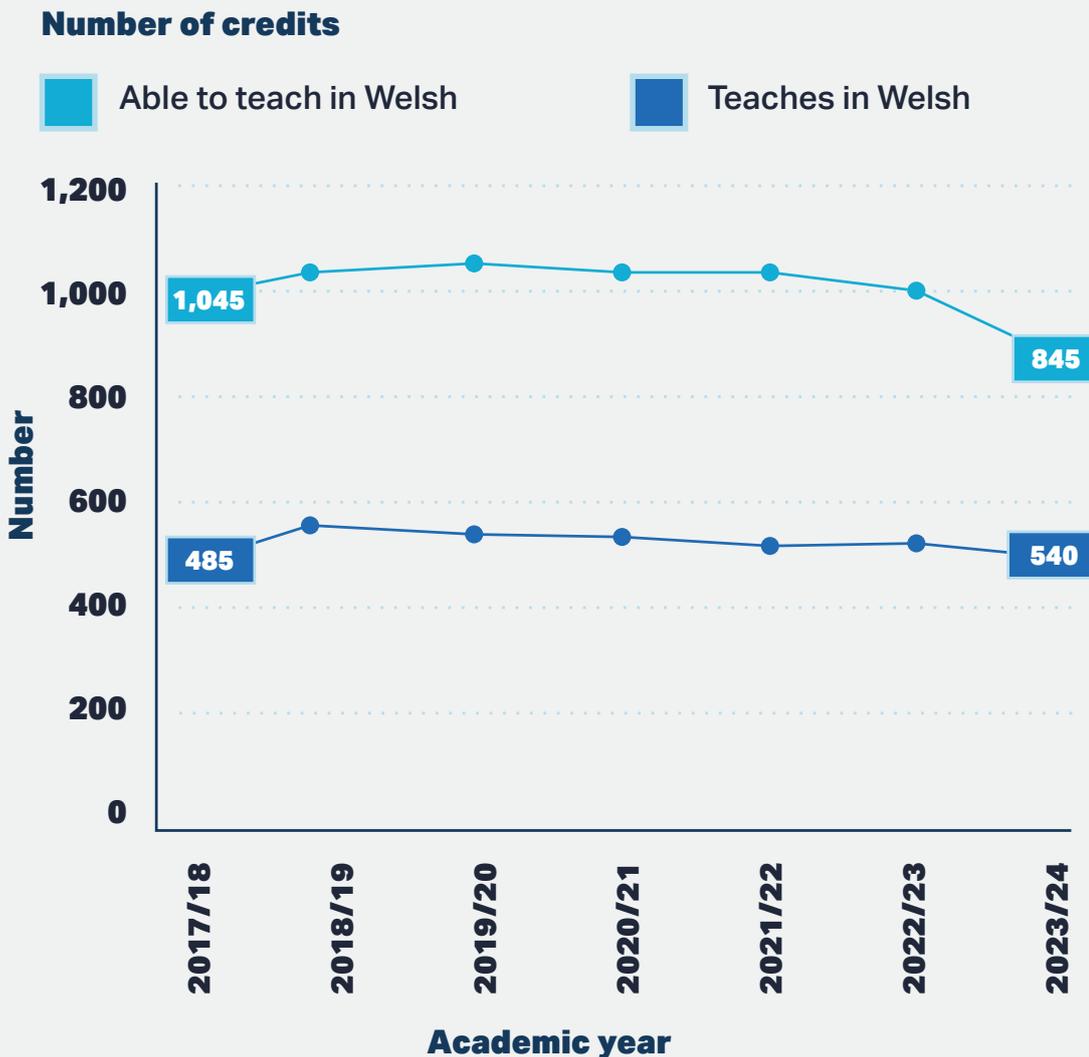
Welsh speakers who did not study any part of their course through the medium of Welsh.

Table 5: Number of credits studied in Welsh by fluent Welsh speakers in 2023/24 in Wales

	At least 1	At least 5	At least 40	At least 80	At least 120	All students
Fluent Welsh speakers	2,735	2,635	1,890	990	610	9,060

(Source: Higher Education Statistics Agency Student and Staff Records)

Chart 20: Academic teaching staff according to whether they were able and/or contracted to teach through the medium of Welsh



(Source: Higher Education Statistics Agency Student and Staff Records)

The number of teaching staff who are able to teach through the medium of Welsh, and who are contracted to do so, has remained relatively stable over the past five years, with a slight decline by 2023/24.

It is striking that a far higher proportion of Welsh students study at universities outside Wales compared with the vast majority of undergraduates from England, Scotland, and Northern Ireland who stay in their home nations to study.³⁸



In 2023/24 **71%** of Welsh students were studying at universities in Wales **28%** were studying in England.

96% of English students were studying in England, **94%** of Scottish students were studying in Scotland, and **78%** of Northern Irish students were studying in Northern Ireland.

According to UCAS statistics, 50% of pupils who had attended Welsh-medium schools and entered university in 2025 had left Wales.³⁹ 49% of them enrolled at universities in England, and 1% in Scotland where there are no opportunities for them to continue studying through the medium of Welsh.

Learning Welsh and developing Welsh skills

Over the reporting period the role and responsibilities of the National Centre for Learning Welsh have expanded significantly. The Centre now plays a central role in the efforts to create more Welsh speakers and to increase the use of Welsh.

Further investment in the National Centre for Learning Welsh was one of the commitments of the Labour and Plaid Cymru 2021 Co-operation Agreement. This additional funding has enabled the Centre to implement the Ymlaen Gyda'r Dysgu scheme which offers free Welsh lessons to 16–25 year olds and to the education workforce. During **2023–24 1,633 young people aged 16 to 25 and 500 from the education sector workforce received free Welsh lessons.**⁴⁰

The Centre has also **continued to expand its Welsh language learning programmes for workplaces. A significant and successful development in this context has been the sectoral courses** where a number of full-time tutors are seen working strategically to increase skills and use of the language in specific sectors ranging from health and care to sport. These workforces can take advantage of courses at all levels – from taster courses to confidence-building provision and intensive residential courses at various levels. This training contributes to enabling organisations to provide better Welsh language services to the public.

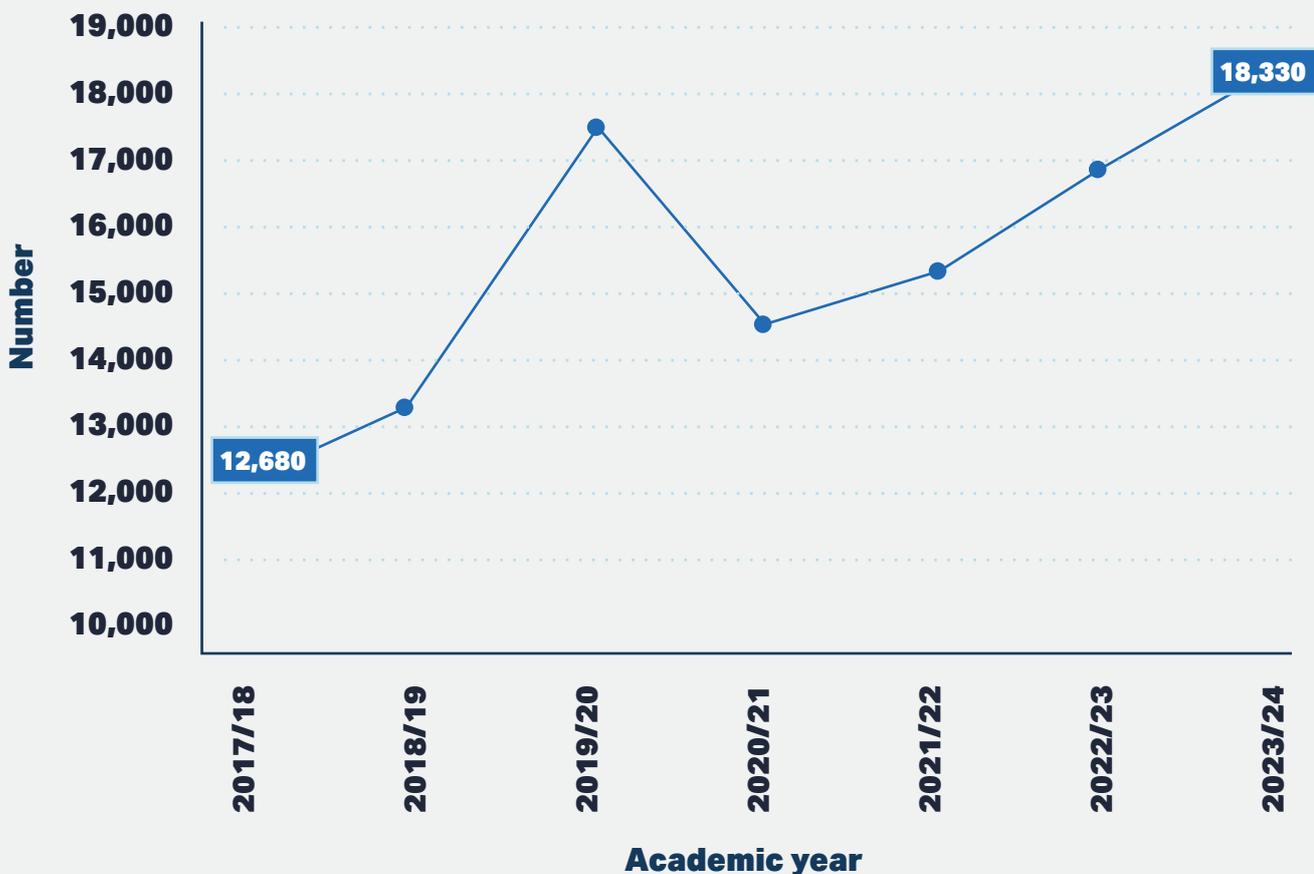
³⁸ Higher Education Student Statistics: UK, 2023/24 - Where students come from and go to study | HESA (20 March 2025).

³⁹ See 'Topic of concern' that 50% of Welsh students have left Wales - BBC Cymru Fyw.

⁴⁰ Welsh Government, *Cymraeg 2050: A million Welsh speakers - annual report 2023 to 2024*.

Since the establishment of the National Centre for Learning Welsh in 2016 there has been a **clear and significant increase in the number of individuals receiving Welsh language training**. Data for 2023/24 shows the highest number of unique learners and learning activities since the Centre began publishing data in 2017. The data shows that the vast majority of all learners (84%) are of working age (16–64 years) and the latest data from 2023/24 shows a significant increase (21%) in the number of young people aged 16–25 learning Welsh.⁴¹

Chart 21: Number of unique learners on National Centre for Learning Welsh courses ⁴²

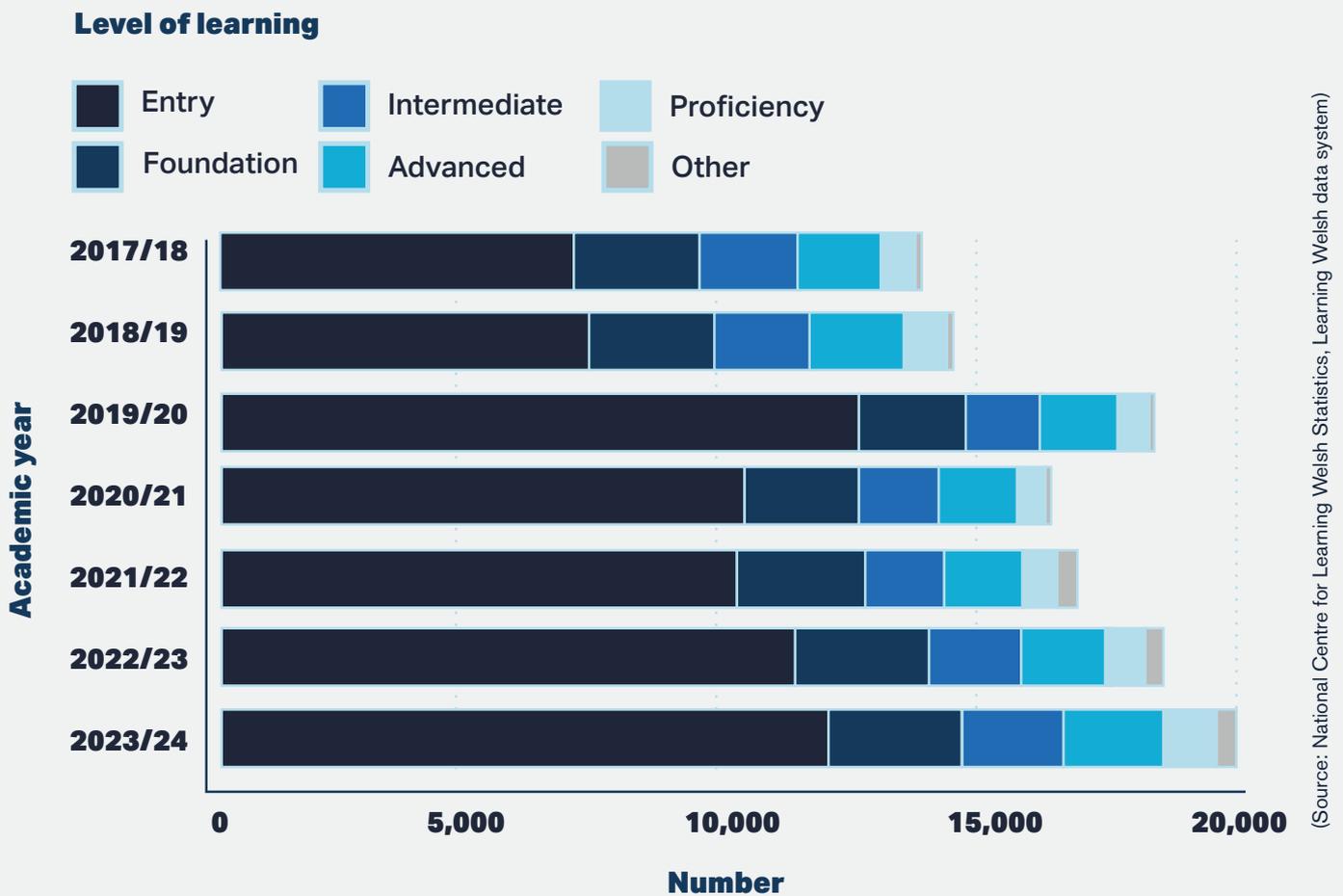


As Chart 22 shows, the overall increase in the number of people learning Welsh is driven largely by growth at entry level. Between 2017/18 and 2023/24 the number of learners has **increased by over 6,000**, of which almost **5,000 are at entry-level**. The chart highlights that far fewer people are studying at foundation level compared to entry level, and overall the numbers continue to decline further up the learning levels. Despite the positive increase in numbers taking Welsh learning courses, it is a matter of concern that so many do not progress to higher-level courses that would enable them to develop into confident Welsh speakers.

⁴¹ Data received directly from the National Centre for Learning Welsh.

⁴² The total numbers of learners do not reflect the numbers of unique learners as learners may take more than one course at different levels during the period in question.

Chart 22: Number of learners by learning level⁴³



In 2023/24 62% of learners were at entry level, 13% at foundation level, 10% at intermediate level, 10% at advanced level, and 5% at proficiency level. In the same year 29% of learners studied in a face-to-face classroom, 41% in a virtual classroom, 23% were self-studying, 3% learned through blended methods, and 3% on residential courses.

The Welsh Language and Education (Wales) Act 2025 and the advent of Medr

The significance of the Welsh Language and Education (Wales) Act 2025 in relation to the statutory education sector has already been outlined, but **the legislation carries equally important implications for the tertiary education sector.** The tertiary education sector is now included within Welsh Ministers’ considerations in developing the National Framework for Welsh Language Education and Learning Welsh, and local authorities must take the sector into account when drawing up local Welsh in Education Strategic Plans. The intention is that the code for describing Welsh-language ability will also be used to facilitate the progression of individuals along the Welsh language lifelong learning continuum.

⁴³ The total numbers of learners do not reflect the numbers of unique learners.

The Act also **establishes the National Institute of Learning Welsh** which will be responsible for providing strategic guidance and direction to Welsh language learning providers throughout the education system. The establishment of the Institute will build on the successes of the National Centre for Learning Welsh, expanding and strengthening its responsibilities and reach.

There is no doubt that the most significant development for the tertiary education sector over the past five years has been the **advent of Medr (Tertiary Education and Research Commission) established by the Tertiary Education and Research (Wales) Act 2022**. The establishment of the Commission brings together responsibility for the strategic planning, oversight and funding of tertiary education. This new structure **creates a more integrated and coherent tertiary system and offers clear opportunities to improve Welsh-medium and bilingual provision** across the post-compulsory sector as a whole.

One of **Medr's strategic duties is to promote encourage demand for, and participation in, Welsh-medium tertiary education**, taking all reasonable steps to ensure that there is sufficient Welsh language provision to meet the demand. Coleg Cymraeg Cenedlaethol has been designated as the body to advise Medr on these duties.

Medr has already published its first strategic plan for 2025–30, and one of the strategic priorities is to promote greater use of the Welsh language and increase the demand for, and participation in, learning and assessment through the medium of Welsh. As part of this, Medr is committed to **developing and implementing a national plan for the Welsh language across the tertiary education sector** as a whole. The **Welsh language will also be one of the conditions for registering and funding tertiary provision in Wales**, which clearly demonstrates Medr's intention to use its regulatory powers in order to achieve its strategic objectives in relation to the Welsh language.

4.2 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

Although some progress has been made in expanding Welsh-medium and bilingual provision over the past five years, there remains considerable work to be done before the tertiary education sector can reliably maintain and develop learners' Welsh-language skills as they continue their education or training.

Over the reporting period there was no meaningful increase in the number of learners studying wholly through the medium of Welsh or completing a substantial proportion of their education or training through the medium of Welsh. In general, there is a **lack of Welsh-medium provision in further education colleges, particularly in vocational subjects.**⁴⁴

The tertiary education sector is starting from a low baseline, which presents a **real opportunity to invest and strategically plan in a way that will bring about transformative change over the next period.** As previously highlighted, this is a critical strategic area, and an essential part of the solution to the challenge of ensuring linguistic progression and creating more favourable conditions to support individuals' language use after leaving statutory education.

While the increase in Welsh-medium and bilingual provision in the tertiary education sector over the reporting period has been modest, there have been major developments in terms of legislation and policy. The existence of the Tertiary Education and Research (Wales) Act 2022 and the Welsh Language and Education (Wales) Act 2025 means that there is a far stronger legislative foundation for the development of Welsh education in the tertiary education sector. **The challenge now is to ensure that these more favourable conditions lead to a significant increase in Welsh-medium provision in the tertiary education sector as a whole.** Medr will have a key role as the body responsible for the regulation and funding of tertiary education in Wales to achieve this and it will be vital that they make the most of their regulatory power to drive change.

In this context, Medr's commitment to creating a national plan for the Welsh language across the tertiary education sector, and their decision to embed the Welsh language as a core element of their regulatory framework is a significant development. However, considerable work will be required to develop the national plan and to ensure that providers proactively expand Welsh language provision and encourage more learners to study through the medium of Welsh and bilingually.

While there are a large number of issues to consider in this context some of the key priorities include:

- **raising learners' awareness of the opportunities available to them to use their Welsh** as they continue their education and training, and **emphasising the importance and value of the Welsh language for their future careers**
- on the basis of the code on describing ability in Welsh that will be developed as a result of the Welsh Language and Education Act, **ensuring a method of measuring learners' Welsh language skills at the start of tertiary education or training** to enable providers to plan appropriately to offer suitable provision to all learners

⁴⁴ Please see the [Welsh Language Commissioner's report on post-compulsory education and the Welsh language](#), and also the recent report of the Children, Young People and Education Committee on [Routes into post-16 education and training](#).

- **prioritising important areas and sectors**, with a particular focus on developing more **Welsh-medium apprenticeships**
- **increasing the capacity of the workforce** that can teach through the medium of Welsh
- **expanding Welsh-medium qualifications**, including vocational qualifications, especially in priority areas
- reforming regional funding and planning systems to incentivise collaboration and strengthen **strategic partnerships between post-16 organisations and schools reinforcing the strong provision that currently exists in schools.**

Over the next five years it will be essential to **capitalise on the huge potential of the tertiary education sector to maintain and develop the Welsh language skills of all learners**, thereby contributing to the creation of individuals who use Welsh in their work and in their communities. Achieving this will require ambitious strategic planning and substantial additional investment in Welsh-medium and bilingual provision over the next period.

The evidence makes clear **that efforts to date have been successful mainly in relation to increasing the numbers who study a relatively small proportion of their studies through the medium of Welsh.** Meeting the Government's broader policy ambitions will require a major uplift in the number of learners who leave the tertiary education sector as confident Welsh speakers.

Linguistic progression also remains a challenge in the lifelong learning sector. The work of the National Centre for Learning Welsh has significantly increased the numbers of people who come into initial contact with the Welsh language and the opportunities to further develop skills in Welsh, working in partnership with a range of organisations in significant sectors.

Several of the other recommendations in this report attest to the importance of building on this work over the next period and channelling resources purposefully to ensure that the lifelong learning Welsh system develops confident, proficient speakers who will meet the needs of the workforce and can provide services in Welsh, particularly in key sectors such as the education sector and the health and care sector. While the growth in entry-level learning and short taster courses is positive, the data clearly shows that **many more of these individuals must progress to higher levels if there is to be a real difference in the numbers acquiring Welsh beyond statutory education. Supporting learners to develop higher-level skills is key to creating confident Welsh speakers who use the language regularly and confidently in our communities and workplaces.**

Priority



There must be an opportunity for all learners to develop their Welsh language skills in the post compulsory education and training sector. To achieve this, appropriate investment is required and greater strategic emphasis must be placed on ensuring that Welsh speaking learners receive a higher proportion of their education and training in Welsh. Increasing the percentage of fluent Welsh speakers who choose to study through the medium of Welsh must be a priority for the sector over the next five years.

Part 3: Increasing the use of Welsh



Although increasing the number of Welsh speakers is essential, we must not overlook the second strategic theme of *Cymraeg 2050*: increasing the use of Welsh. **After all, creating Welsh speakers has limited value unless those individuals are able and willing to go on to use the language in their daily lives.** For the Welsh language to thrive, it must be used regularly and naturally throughout Wales and in a wide range of contexts.

While the census does not collect direct data on language use, **there is a strong relationship between factors such as the density of Welsh speakers in an area, or the fluency of Welsh speakers, and language use.** One of the primary sources offering direct evidence on the use of Welsh is the Welsh Government's Language Use Survey.¹ The most recent survey took place between July 2019 and March 2020, with the results published in a series of statistical bulletins between 2022 and 2024. Although this survey data does not relate directly to the past five years, until we receive a later survey, the data from the 2019–20 Language Use Survey will be treated as describing the situation today.

The following chapters will examine the quantitative data resulting from this survey alongside other surveys including the National Survey for Wales,² the Annual Population Survey,³ and our own research in the office of the Welsh Language Commissioner on the use of Welsh among children and young people.⁴ We will also consider relevant policy developments over the reporting period, again highlighting the priorities and opportunities identified by the Commissioner for the next five years.

The main statutory aim of the Welsh Language Commissioner is to increase the use of Welsh. **Accordingly, this section will consider the evidence gathered about language use through our work implementing the Welsh Language (Wales) Measure 2011 and working with the private and third sectors.** Using methods such as hidden-shopper exercises, discussion groups, opinion surveys and ongoing organisational engagement, we obtain a detailed picture of user experiences and organisational compliance. This provides first-hand insight into how organisations contribute to creating a Wales where Welsh is a living language, as well as improving the experiences of service users. This section provides an overview of the evidence we have and highlights key priorities and opportunities for the Commissioner's work over the next five years.

¹ [Language use survey | GOV.WALES.](#)

² [Welsh language speaking ability and use \(National Survey for Wales\): April 2022 to March 2023 | GOV.WALES.](#)

³ [Welsh language data from the Annual Population Survey | GOV.WALES.](#)

⁴ Welsh Language Commissioner, [The use of Welsh among children and young people](#) (September 2025).

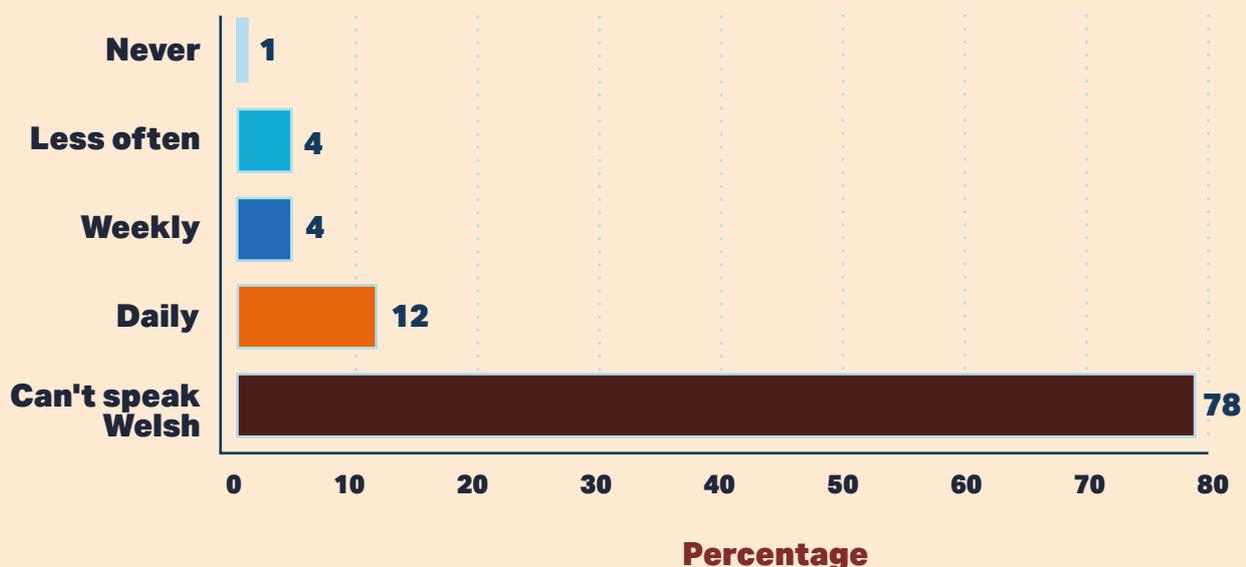
1. Social use of Welsh and community language planning

The census shows that one of the main challenges facing the Welsh language today is ensuring that children and young people retain the language after leaving the education system. The evidence clearly shows that a significant number of children and young people who have learnt Welsh at school gradually lose their skills as they get older. One of the most likely reasons for this is the lack of opportunities to use the language in social situations outside, and beyond, the education system. It is unsurprising, therefore, that the focus of language-planning efforts in Wales today is increasing opportunities for people to use Welsh socially and in varied contexts.

1.1 The evidence

The second target of the *Cymraeg 2050* strategy is to double the percentage of the population who speak Welsh daily, and who can speak more than a few words of Welsh, from 10% in 2013–15 to 20% by 2050. According to the 2019–20 Language Use Survey, 10% of people aged three or older spoke Welsh daily and could speak more than a few words. This means there has been no change since 2013–15. Looking at the population of Wales as a whole, regardless of their fluency levels, we can see that 12% use Welsh daily, which is exactly the same figure as reported in 2013–15.

Chart 1: Frequency of speaking Welsh amongst the population aged three or older



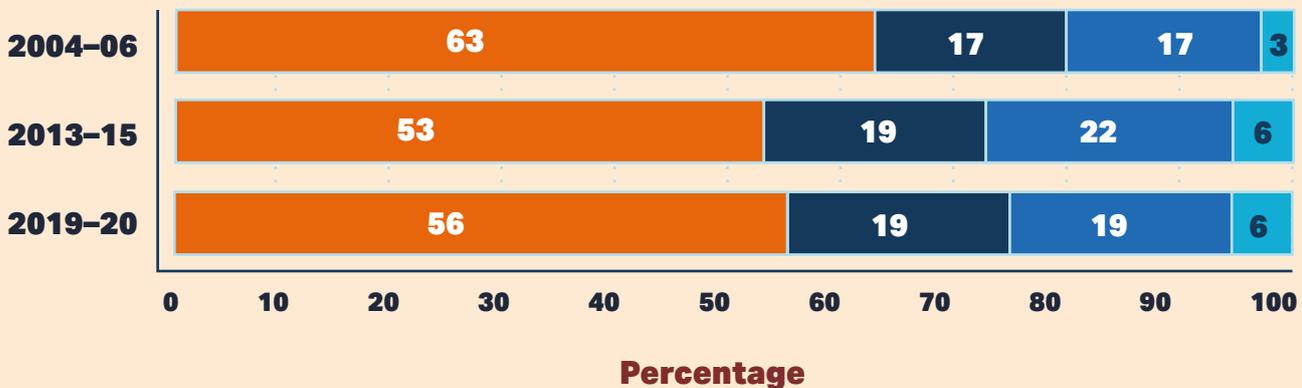
The percentage of the population who speak Welsh every week (4%) and those who never speak Welsh (1%) has also remained consistent with the results of the 2013–15 survey. Those who reported speaking Welsh less often than every week fell by one percentage point to 4%.

The Annual Population Survey also collects information on how often Welsh speakers speak the language, and reports patterns similar to the Language Use Survey. The Annual Population Survey for the year ending 31 March 2025 reported that 13.8% of people aged three or older speak Welsh daily, 5.3% weekly and 6.7% use it less often, with a further 1.2% saying they never speak Welsh despite being able to do so.⁵

Among Welsh speakers specifically, the percentage who speak the language daily has decreased since 2004–06, but there has been a modest increase since 2013–15. In 2019–20 over half of Welsh speakers reported using Welsh daily.

Chart 2: Frequency of speaking Welsh among Welsh speakers aged three or older

Frequency



(Source: Welsh Language Use Survey 2004–06, 2013–15, and 2019–20)

Key conclusions

- There has been very little change in how often the whole population uses Welsh.
- The percentage of **Welsh speakers who use the language daily has increased slightly since 2013–15, but has decreased since 2004–06.**

⁵ Annual Population Survey - Ability to speak Welsh by local authority and year.

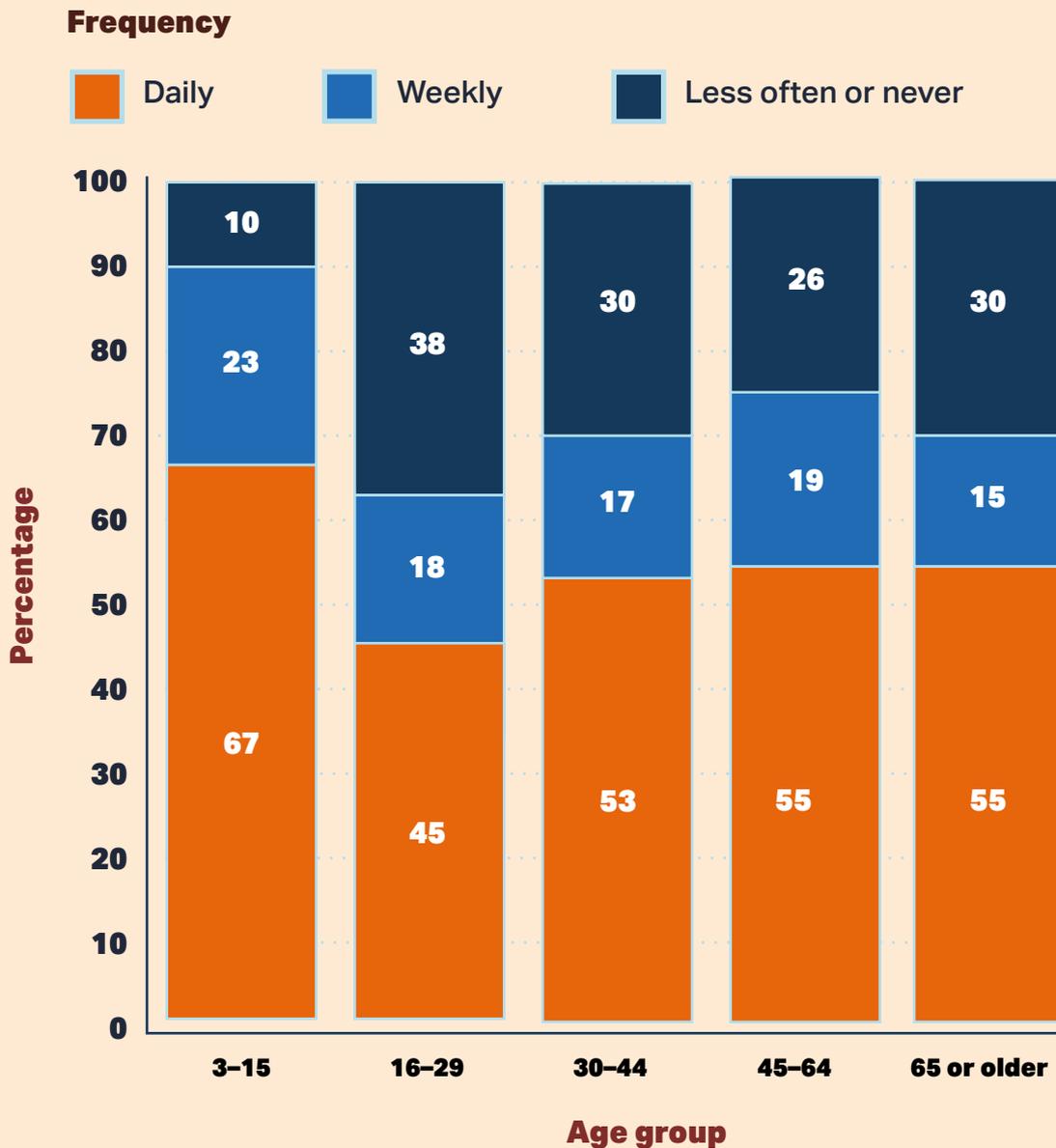
What factors influence the use of Welsh?

The Language Use Survey clearly shows that patterns of language use vary significantly depending on factors such as the age of speakers, their fluency and confidence in Welsh, where and when they learnt the language, and where they live.

Age

Looking at the use of Welsh by age, we can see that children and young people aged 3–15 are far more likely to use Welsh daily than any other age group. This probably reflects the importance of schools in creating opportunities to use the language.

Chart 3: Frequency of speaking Welsh amongst Welsh speakers by age



(Source: Welsh Language Use Survey 2019–20)

Compared to the results of the 2013–15 Language Use Survey we see **that the percentage of children and young people aged 3–15 who use Welsh daily has increased from 59% to 67%, and the percentage of 16–29 year-olds who use Welsh daily has increased from 39% to 45%**. Daily use of the Welsh language has remained relatively stable in the other age groups.

Fluency and confidence in the Welsh language

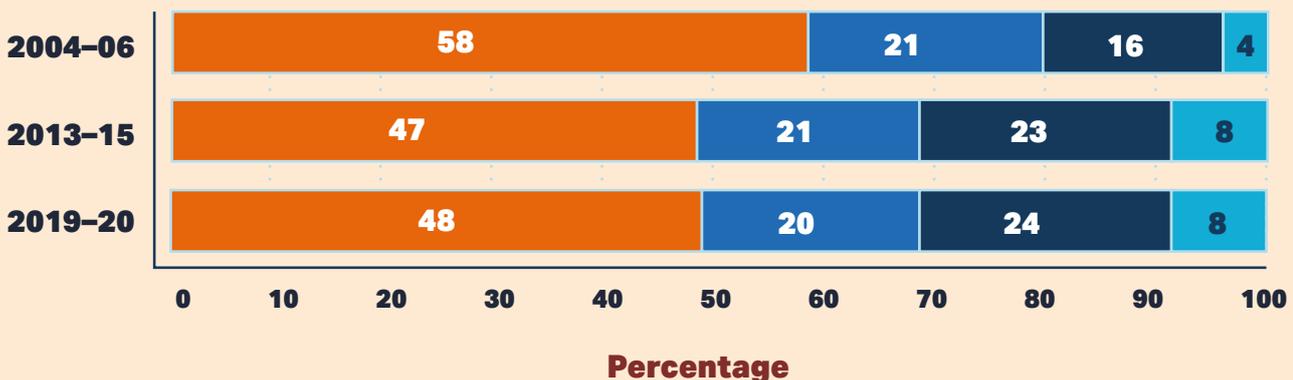
It is not surprising that fluent Welsh speakers are far more likely to use Welsh daily. For example, in the 2019–20 survey 85% of fluent Welsh speakers indicated that they use Welsh daily. 42% of those who reported being able to speak a fair amount of Welsh used Welsh daily, 24% of those who could speak a little Welsh, and 17% of those who could only say a few words.

As shown in Chart 4, the percentage of fluent Welsh speakers has remained relatively stable between 2013–15 and 2019–20, but has fallen by 10 percentage points between 2004–06 and 2019–20. The percentage who speak a fair amount of Welsh has remained relatively stable since 2004–06, and there has been an increase in the percentage who can speak a little Welsh and can only say a few words. In 2019–20 48% of Welsh speakers described themselves as fluent, 20% indicated that they could speak a fair amount of Welsh, 24% could speak a little Welsh, and 8% could only say a few words.

Chart 4: Percentage of Welsh speakers aged three or older by fluency level

Fluency

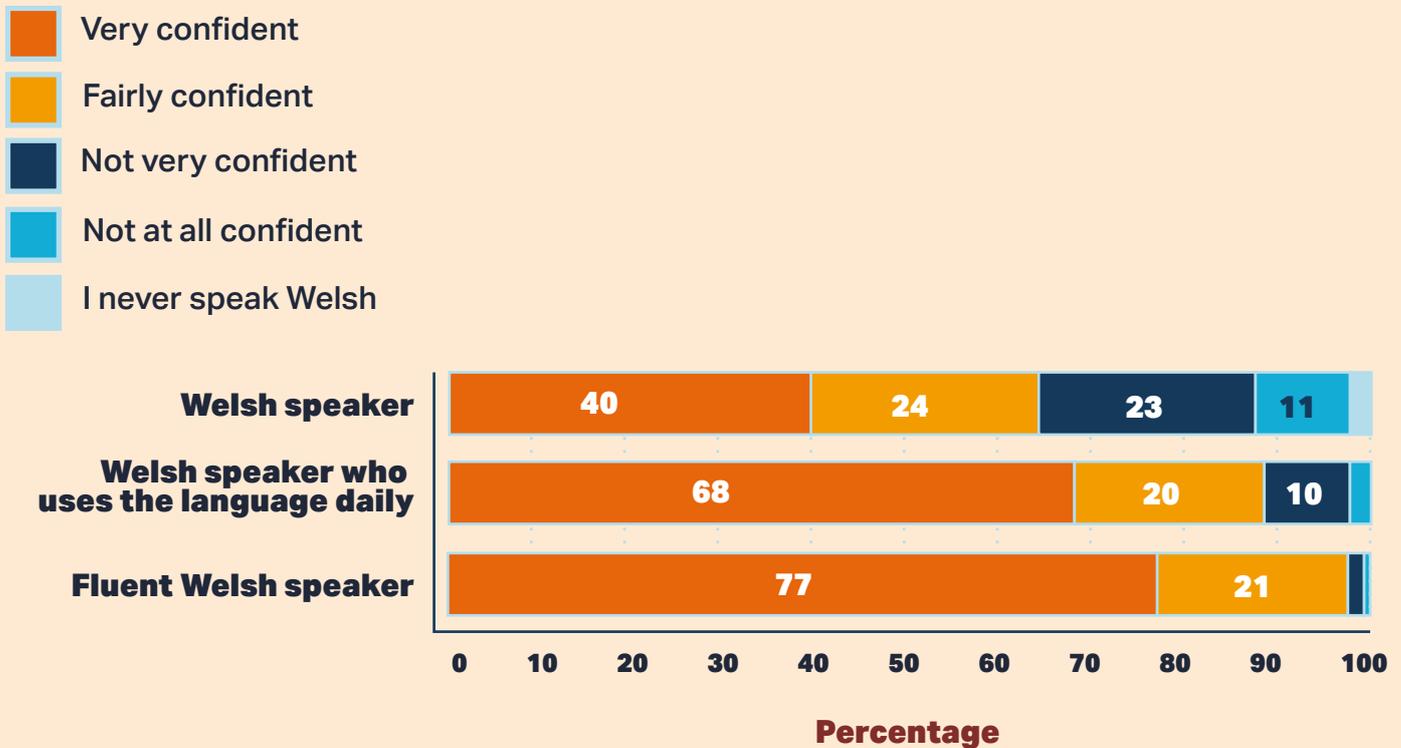
- I'm fluent in Welsh
- I can only speak a little Welsh
- I can speak a fair amount of Welsh
- I can say just a few words



(Source: Welsh Language Use Survey 2004–06, 2013–15, and 2019–20)

The evidence also shows a clear link between confidence to speak Welsh, frequency of use, and fluency. As illustrated in Chart 5, among all Welsh speakers aged 16 or older, 40% indicated that they were very confident in speaking Welsh. 24% were quite confident, 23% not very confident, and 11% not at all confident. Of those who report using the language daily, 68% stated that they are very confident in speaking Welsh. 77% of fluent Welsh speakers were very confident when speaking Welsh.

Chart 5: Confidence of Welsh speakers aged 16 or older when speaking the language, according to speakers who use the language daily and those who consider themselves fluent in the language

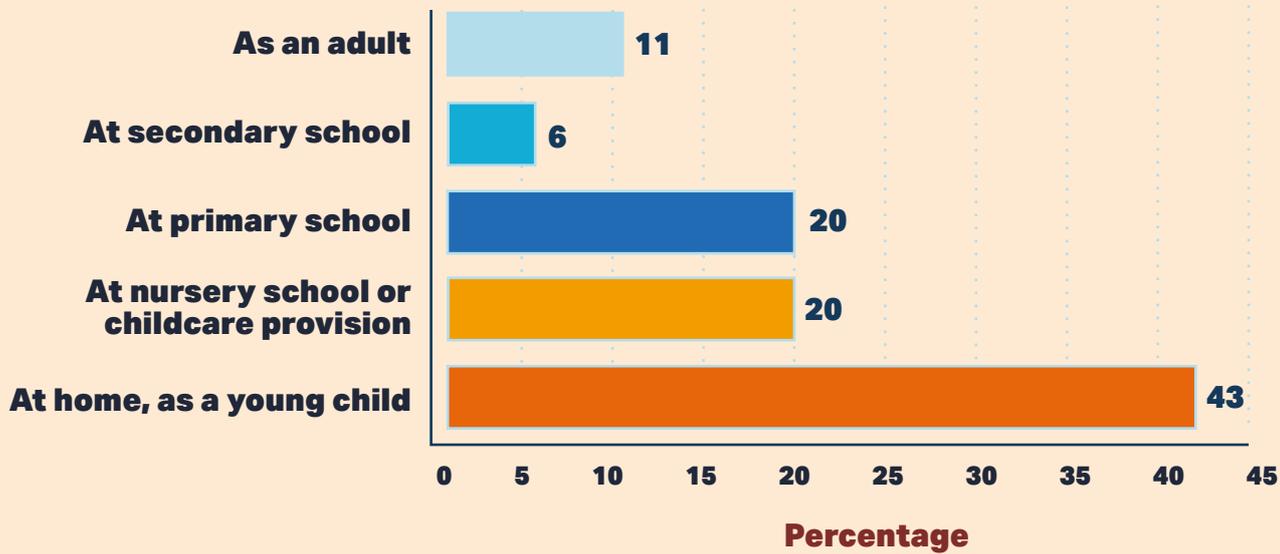


(Source: Welsh Language Use Survey 2019–20)

Where individuals have learnt Welsh

The 2019–20 Language Use Survey shows that 43% of Welsh speakers learnt the language at home as young children, 20% acquired it in nursery school or childcare provision, 20% in primary school, 6% in secondary school, and 11% as adults.

Chart 6: When Welsh speakers started learning to speak the language



(Source: Welsh Language Use Survey 2019–20)

As already mentioned in Part 2, there has been a significant shift over the past fifty years from the home to the education system as the main source of new Welsh speakers. As a result, a significantly smaller percentage of today’s young children have learnt the language at home, and a far greater percentage have acquired the language at school.



69% of Welsh speakers aged 65 or over have learnt Welsh at home.

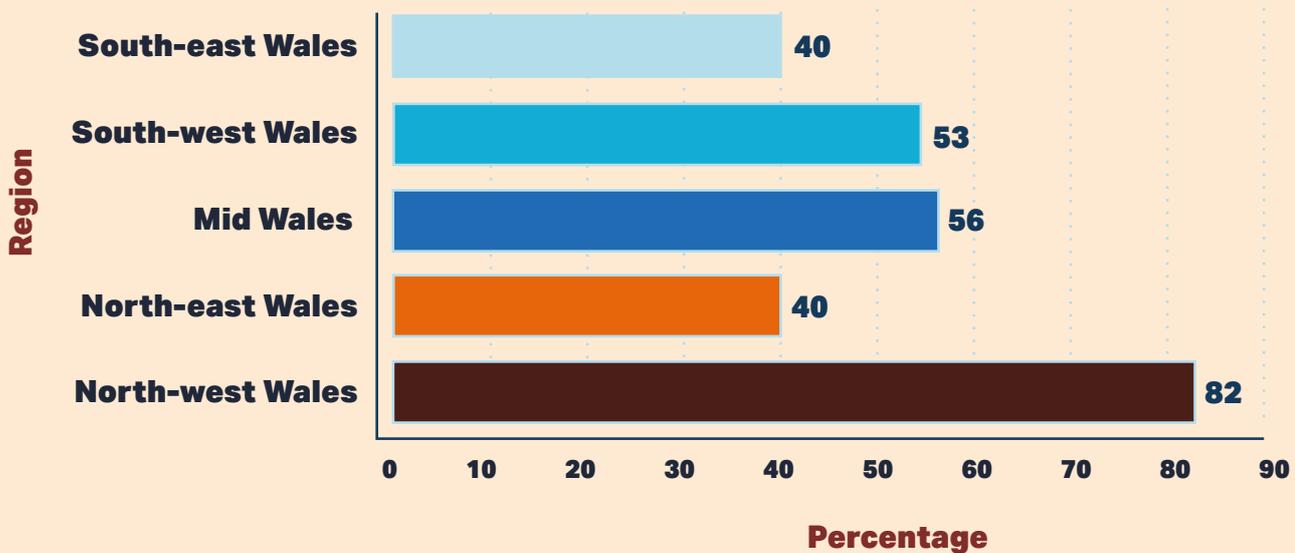
The equivalent figure for Welsh speakers aged 3–15 is **31%**: **69%** of this age group have learnt Welsh via the education.

As with fluent Welsh speakers, individuals who learnt Welsh at home as young children are also far more likely to use Welsh, with 82% indicating that they use Welsh daily. In comparison, only 32% of individuals who learnt Welsh in primary school indicated that they used Welsh daily.

Location

As we know, there are significant variations in the percentage and density of Welsh speakers in different areas of Wales, and these differences are also reflected in patterns of language use. For example, Welsh speakers over the age of 16 in north-west Wales were far more likely than Welsh speakers in the rest of Wales to be using Welsh daily.

Chart 7: Percentage of Welsh speakers aged 3 or over who speak Welsh daily, by region

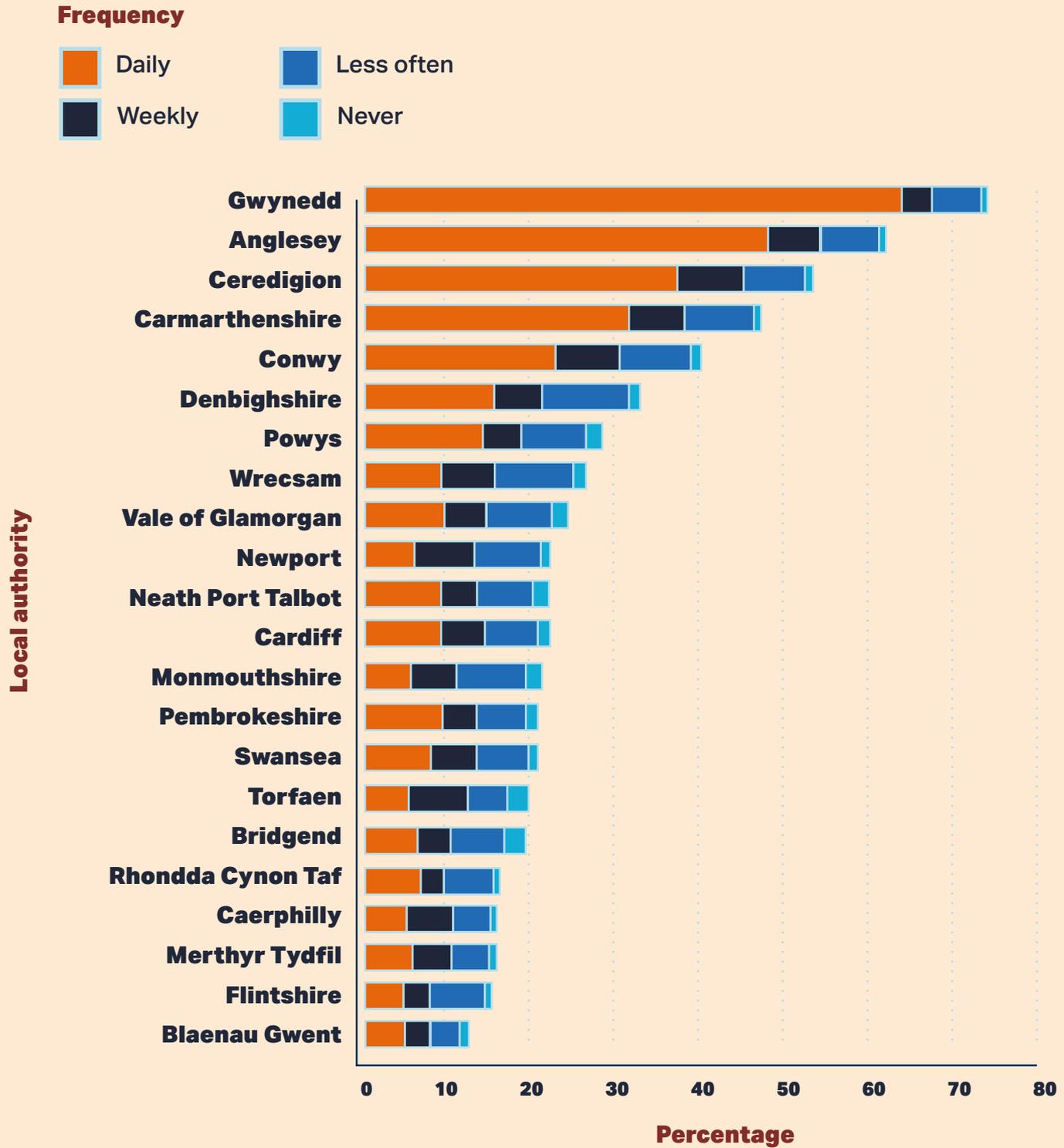


(Source: Welsh Language Use Survey 2019–20)

Although the 2019–20 Language Use Survey does not report on results at local authority level, data on Welsh language use at local authority level can be found in the annual population surveys. The survey for the year ending June 2025 reports that the counties with the highest percentages of people reporting daily use of Welsh were Gwynedd (64%), Anglesey (48%), Ceredigion (38%) and Carmarthenshire (32%). These figures align closely with regional trends seen in the Language Use Survey.

These results also reinforce Prosiect Bro's findings regarding the significance of areas with a high density of Welsh speakers in supporting the social use of the language. As previously noted, both the census results and Prosiect Bro's detailed analysis, show that the position of the Welsh language in areas with a high density of speakers is weakening.

Chart 8: Frequency of speaking Welsh by local authority



(Source: Annual Population Survey for the year ending June 2025)

Key conclusions

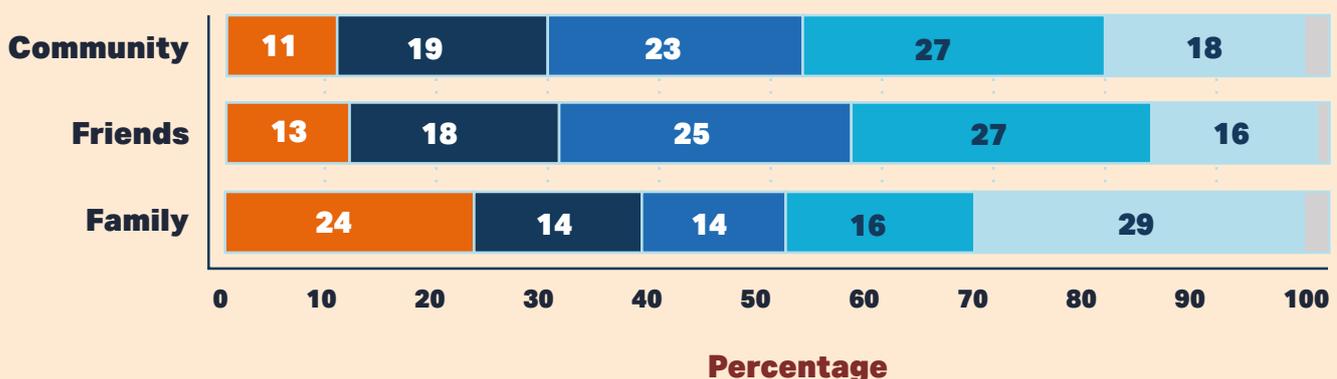
- **The use of Welsh** across different contexts is **significantly higher among fluent Welsh speakers, those who learnt Welsh at home as young children, and in areas with a higher density of Welsh speakers.**
- There have been notable demographic shifts among Welsh speakers in recent years. There are **fewer fluent Welsh speakers today than there were ten years ago, for example. There has been a noticeable shift from home to school as the primary source of new Welsh speakers.** At the same time, the **density of speakers in traditional Welsh language strongholds is decreasing.** Together, these trends are likely to create less favourable conditions for increasing the use of Welsh.

Social use of the Welsh language

The Language Use Survey asks Welsh speakers about the ability of their extended family, friends, and members of the local community to speak Welsh. This provides a valuable insight into the opportunities that exist for Welsh speakers to use the language.

Chart 9: Welsh language ability of Welsh speakers' social groups

Ability in Welsh

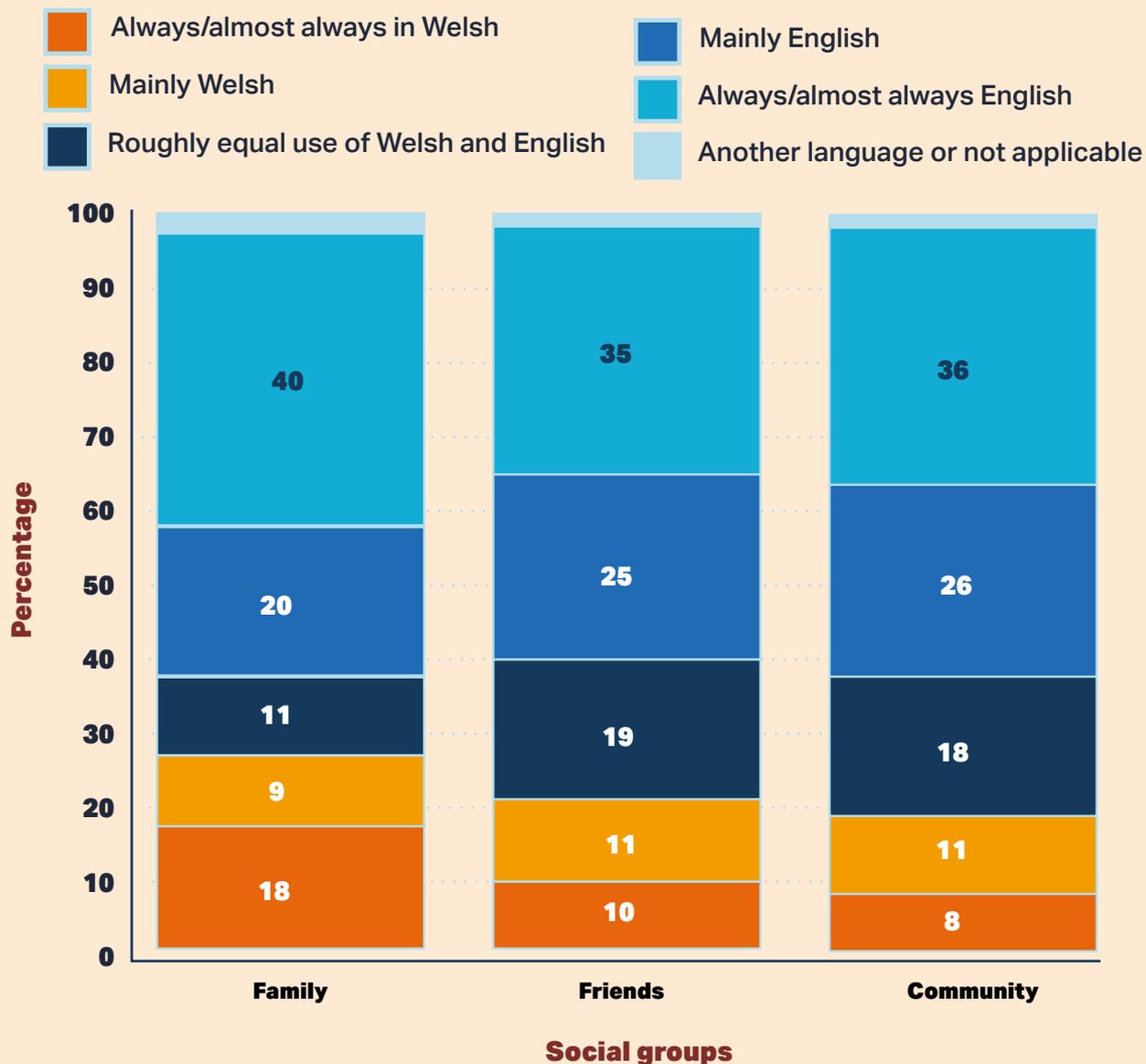


(Source: Welsh Language Use Survey 2019–20)

As illustrated in Chart 9, 52% of Welsh speakers report that at least half of their extended family can speak Welsh. A further 56% said that at least half of their friends can speak Welsh, and 53% said that at least half of the people in their local community can speak Welsh.

These opportunities that Welsh speakers have to use Welsh can be compared with statistics on what language Welsh speakers usually use with these social groups. Welsh speakers are more likely to use Welsh always or mainly with their family (28%) compared to their friends (21%) and people in the local community (19%). Overall, **the data suggests that Welsh speakers do not consistently take advantage of opportunities to use Welsh with their family, friends, and wider social groups.**

Chart 10: Language usually spoken by Welsh speakers with social groups



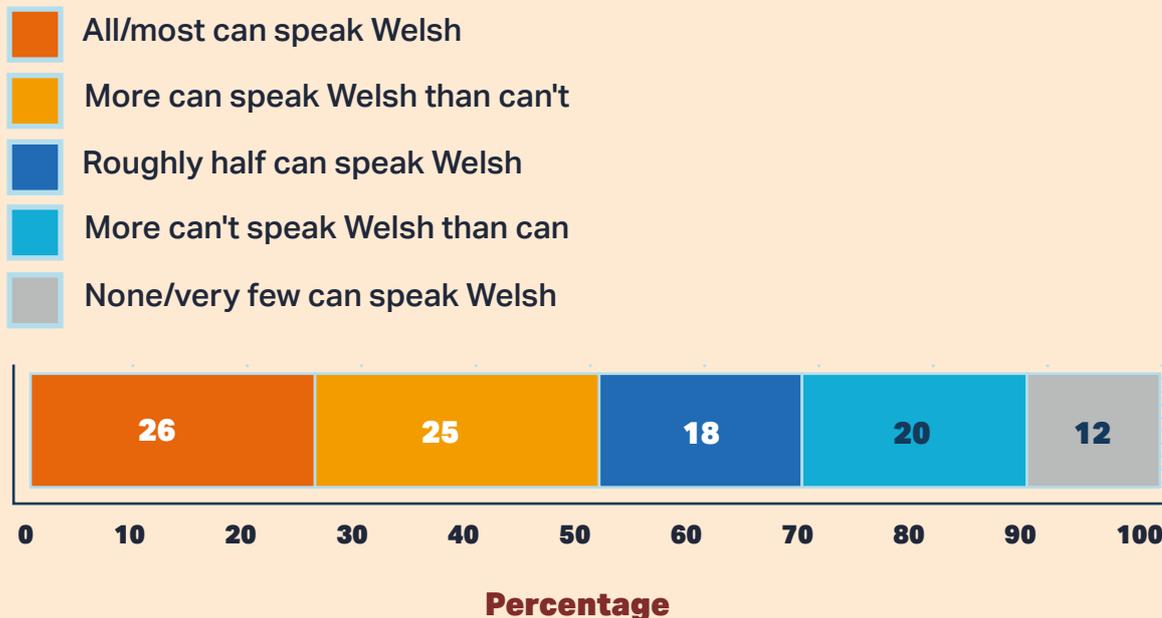
(Source: Welsh Language Use Survey 2019–20)

Welsh speakers over the age of 16 in north-west Wales were far more likely than Welsh speakers in the rest of Wales to report that at least half of their social groups were able to speak Welsh (extended family: 77%, friends: 81%, and people in the local community: 85%). The data also shows that **Welsh speakers in areas where there is a higher density of Welsh speakers are far more likely to use Welsh with their social groups.** For example, 51% of Welsh speakers in north-west Wales speak Welsh mainly or always with their extended family, 44% with their friends, and 46% with people in their local community.

It is also unsurprising that fluent Welsh speakers, those who speak Welsh daily, and those who had learnt Welsh at home as young children were far more likely to say that at least half their social groups were able to speak Welsh, and that they were far more likely to use Welsh regularly with those groups.

The Language Use Survey also asks children and young people (3–15 years old) about their use of Welsh in social contexts. As shown in Chart 11, Welsh-speaking children and young people were more likely to report that their friends could speak Welsh (69%) compared to the percentage of adults who reported that their friends could speak Welsh (56%).

Chart 11: Welsh language ability of children and young people’s friends

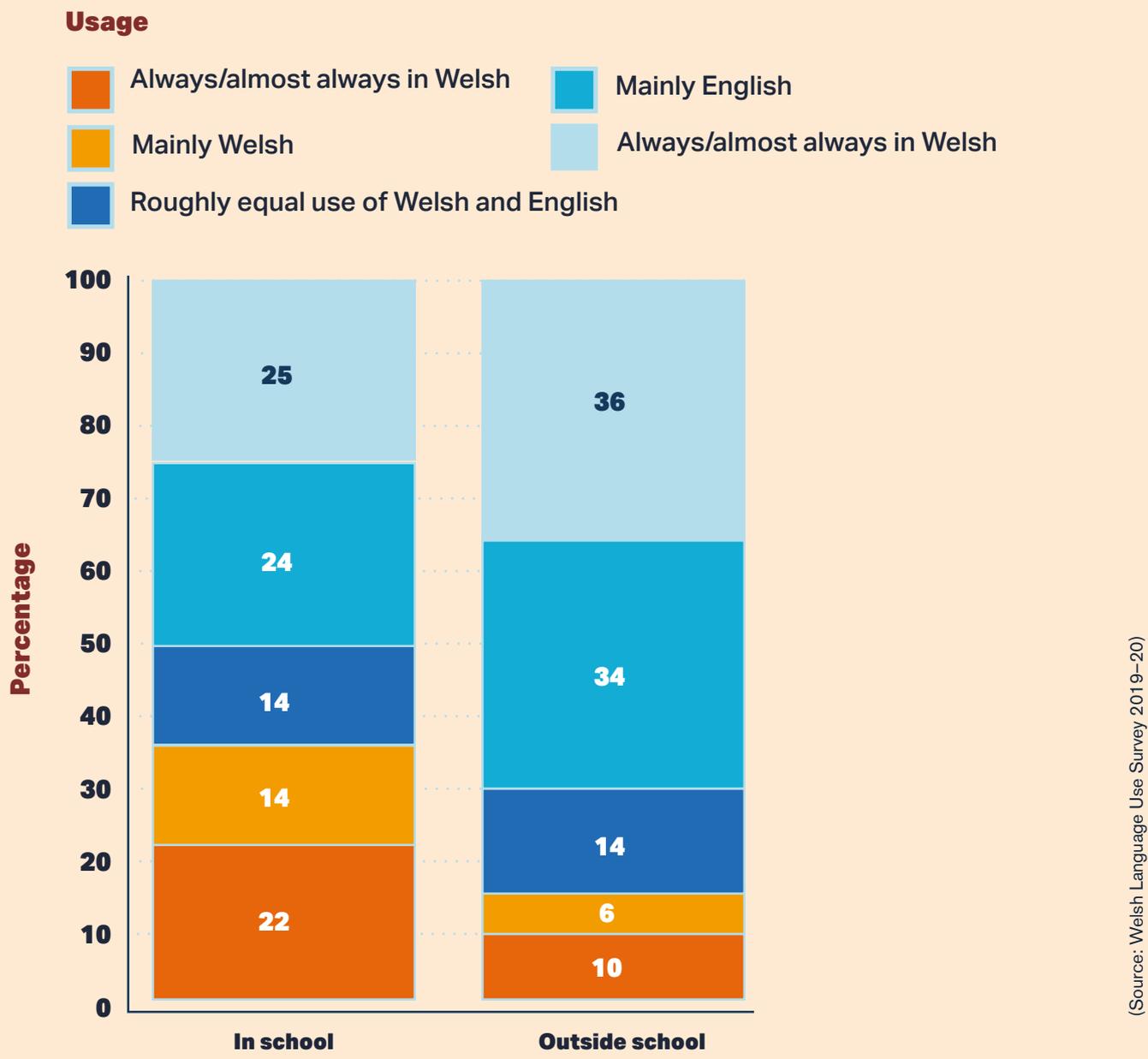


(Source: Welsh Language Use Survey 2019–20)

In terms of children and young people’s use of Welsh with their friends, the data shows that they are far more likely to speak Welsh with their friends at school than outside school. While 36% of Welsh speakers always or mainly use Welsh with their friends at school, only 16% did so outside school.

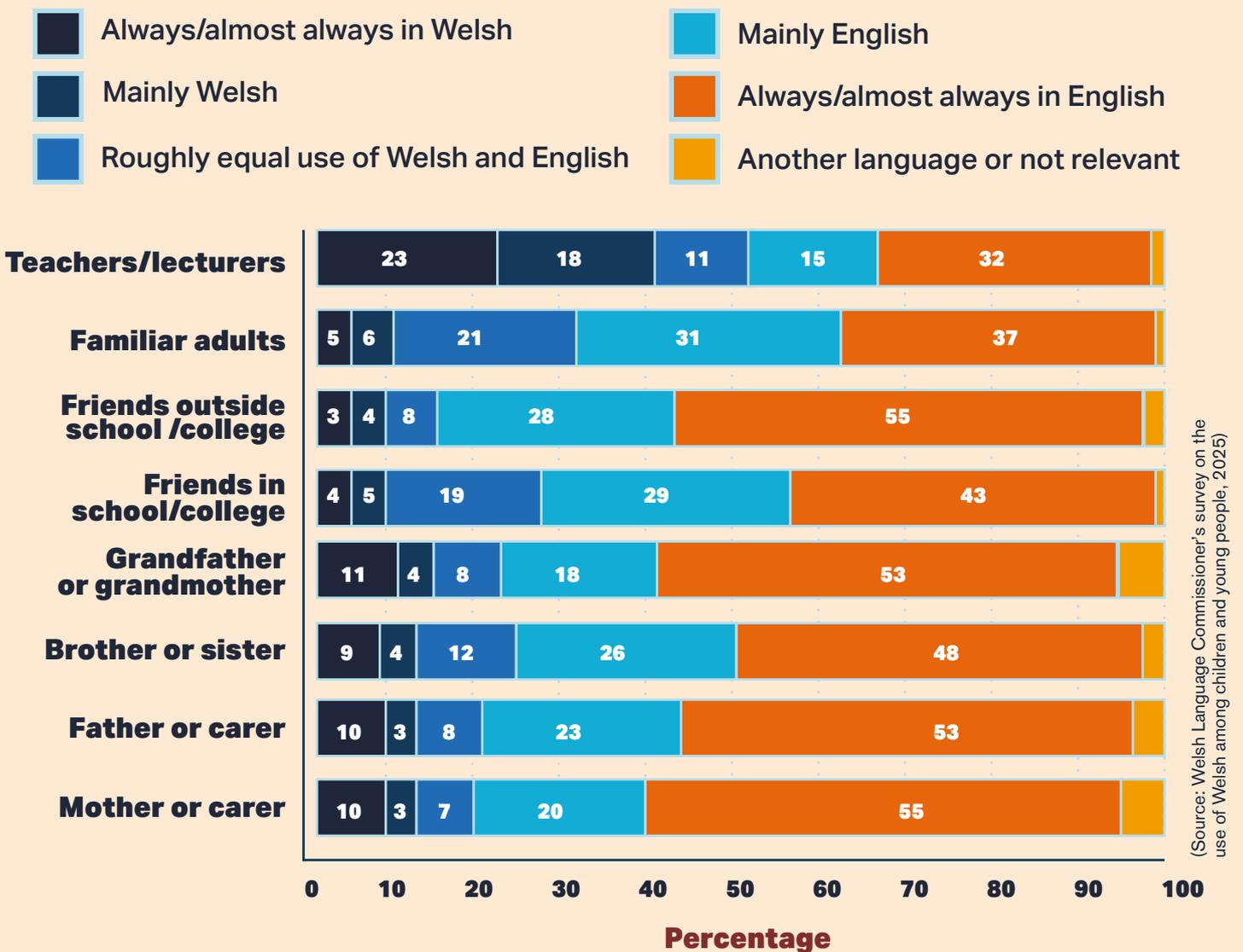
Children and young people’s use of Welsh with their friends outside school is lower than the equivalent figure for adults, despite the fact that children and young people are more likely to report that their friends are able to speak Welsh.

Chart 12: Use of Welsh by Welsh-speaking children and young people with friends



In May 2025, the Commissioner published a research report on children and young people’s use of the Welsh language in different contexts. Over 1,600 children and young people (aged 11–21) across Wales responded to the questionnaire. As part of the research, they were asked what language they mainly used when interacting with different social groups.

Chart 13: Language use with family and friends



Looking at all the responses, we see that the respondents were most likely to speak Welsh with teachers or lecturers. Over 40% of respondents spoke Welsh always or mainly with teachers or lecturers. **Outside school, respondents were most likely to speak Welsh with their family, and it is noteworthy that grandparents are at the top of the list.**

The percentages that indicated they use Welsh with their families and friends in the Commissioner's survey are significantly lower than those of the Language Use Survey. This probably partly reflects differences in the sample and methodology of these surveys.⁶

Patterns of language use vary considerably when responses are analysed by other characteristics. The percentage who indicate that they always or mainly speak Welsh with family or friends increases significantly among fluent Welsh speakers and those who learnt Welsh at home. For example, although 9% of the entire sample always or mainly used Welsh with their friends at school/college, this figure rises to 18% among fluent Welsh speakers, and to 28% among those who acquired Welsh at home.

Key conclusions

- The evidence **clearly shows that social use of the Welsh language remains a significant challenge**. This is particularly true when it comes to **children and young people's use of Welsh outside school**.
- Individuals who speak Welsh **are more likely to use Welsh with their family** than with their friends or within the community.
- The data shows that **children and young people are far more likely to use Welsh with their friends at school than outside school**.
- **Children and young people's use of Welsh with their friends outside school is lower than adults' use of Welsh with their friends**, despite the fact that a higher proportion of young people's friends are able to speak Welsh.

Use of the Welsh language in events and activities

Overall, the Language Use Survey shows that Welsh speakers are more likely to have attended an event or activity held through the medium of English than Welsh. **The only notable exception is a festival or Eisteddfod, where 20% of respondents indicated that they had attended such an event in Welsh in the previous 12 months.** Once again, Welsh speakers from north-west Wales, fluent Welsh speakers, those who spoke Welsh daily, and those who started speaking Welsh at home as young children, were more likely to have attended an event or activity that was held through the medium of Welsh.

⁶ For example, the Language Use Survey sample is based on those who have identified as Welsh speakers in the National Survey for Wales, and who agreed to complete the Language Use Survey. The Commissioner's questionnaire was shared with children and young people more generally, and it is likely that a significant number of responses were completed in schools. It must also be borne in mind that the Language Use Survey may have been answered by a parent or guardian on behalf of their children, where the Commissioner's questionnaire was answered by the children and young people themselves.

The above patterns are fairly consistent among the events or activities attended by Welsh speakers over the age of 16 (Chart 14), and among Welsh-speaking children and young people (Chart 15).

Chart 14: Organised events or activities attended by Welsh speakers over the age of 16 in the previous 12 months, by the language of the event

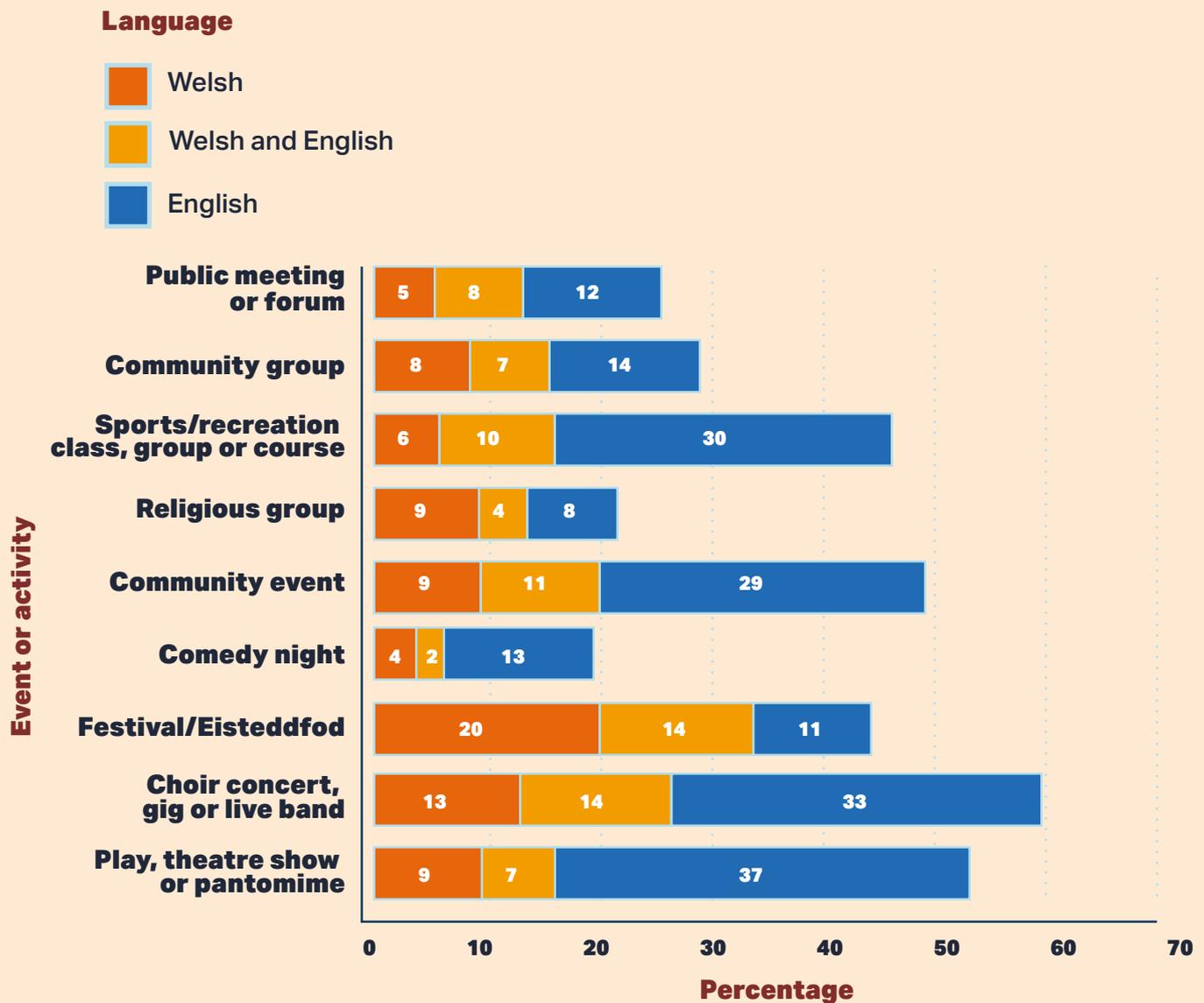
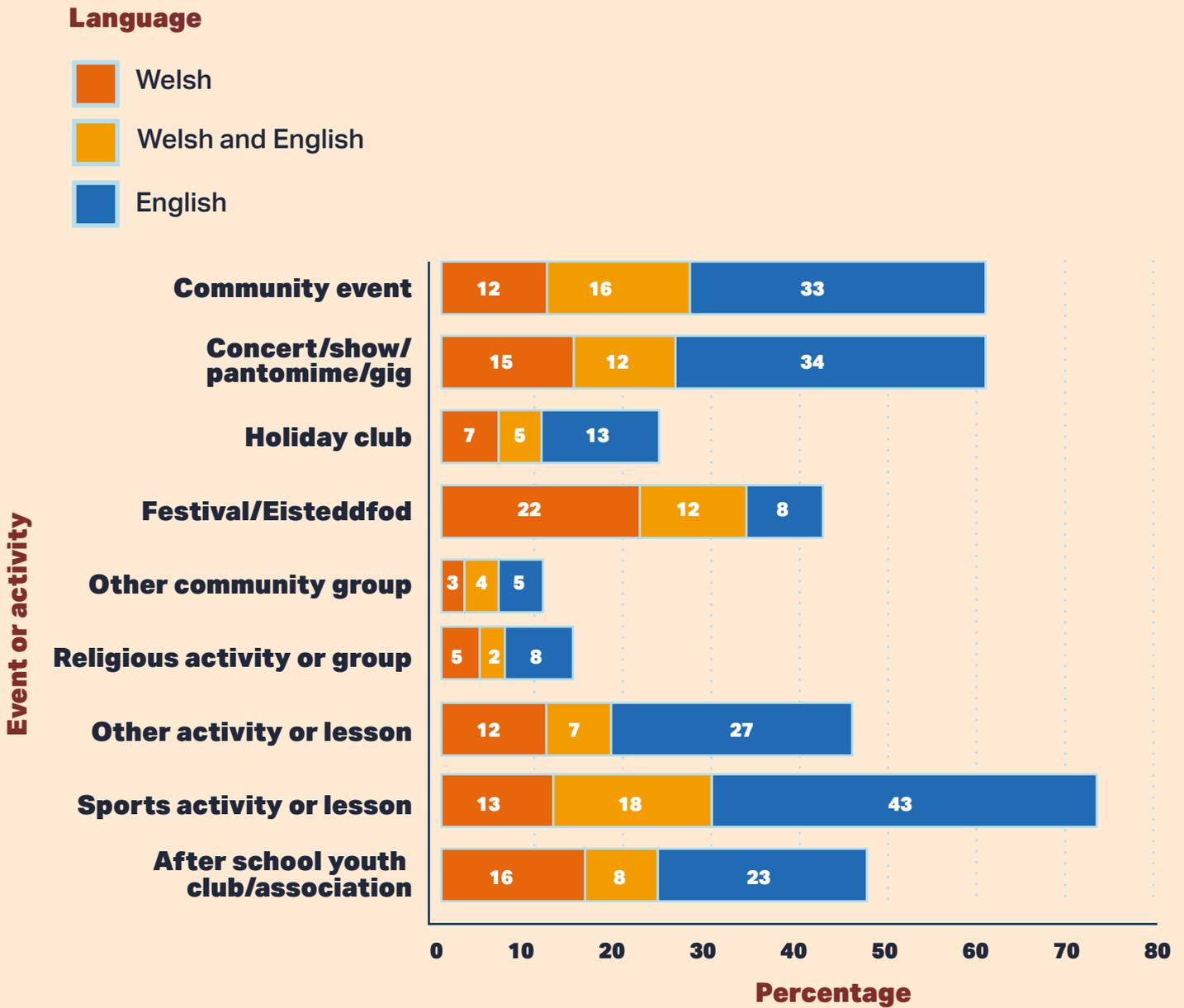


Chart 15: Welsh-speaking children and young people’s attendance at organised events or activities outside school over the previous 12 months





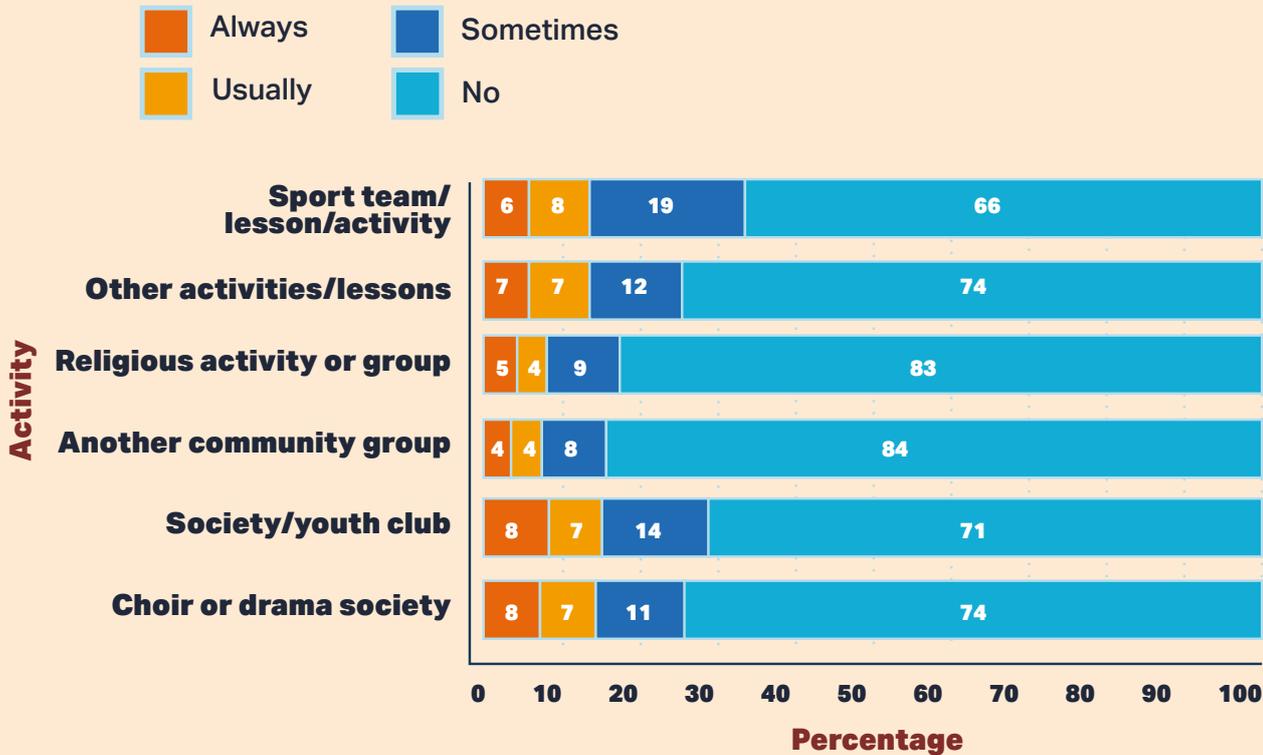
53% of children and young people say they take part in sports activities.

This is **twice as high** as the percentage who indicated that they took part in other types of activity.

The Commissioner’s research report further detailed the types of activities children and young people did outside school, and also the extent to which they were using Welsh with their friends during these activities.

Respondents were far more likely to be a member of a sports club or attend sporting activities than any of the other options, with 53% of the sample stating that they attended a sporting activity outside school. **The data also shows that children and young people are most likely to use Welsh with their friends when taking part in sporting activities.**

Chart 16: Use of the Welsh language by children and young people attending different activities



(Source: Welsh Language Commissioner’s survey on the use of Welsh among children and young people, 2025)

These percentages increase significantly when the data is analysed by other characteristics. For example, 34% of the overall sample reported using some Welsh during sports activities, compared with 53% of fluent Welsh speakers and 71% of those who learnt Welsh at home.

Key conclusions

- With the exception of festivals such as the Eisteddfod, **Welsh speakers are more likely to attend events and activities through the medium of English** than Welsh.
- Children and young people are far more **likely to attend sports activities** on a regular basis compared to any other type of activity. Children and young people are also **more likely to use Welsh with friends and coaches in sporting activities** compared to other events and activities.

1.2 Main developments

Grants to promote and facilitate the use of the Welsh language

Over the reporting period the Government has continued to provide **grants to a range of organisations to promote and facilitate the use of Welsh**. For example, in 2023–24, grants were allocated to 43 organisations to facilitate the use of the Welsh language at a community and national level. Recipients included the National Eisteddfod, Cymdeithas Eisteddfodau Cymru, Urdd Gobaith Cymru, the Mentrau Iaith, Merched y Wawr, the Wales Young Farmers Clubs, papurau bro, and Cymdeithas Cyfieithwyr Cymru.

These grants are crucial in **enabling various organisations to create meaningful opportunities for people to use the Welsh language in the community**. They are particularly important for ensuring that children and young people can participate in cultural and sporting experiences through the medium of Welsh.

Although the structure of these grants has remained relatively stable throughout the reporting period, their contribution to supporting the work of key organisations such as the Urdd, the mentrau iaith, the Wales Federation of Young Farmers Clubs and the National Eisteddfod, which play a central role in promoting the use of the Welsh language throughout Wales, must be acknowledged. This includes the **role the Urdd plays in providing sporting activities and arts and cultural activities to thousands of children and young people** across Wales. Similarly, **Mentrau Iaith Cymru and the local mentrau iaith provide an extensive range of activities and events at a local and national level**, all designed to increase opportunities for people to use Welsh.

As the census data shows, there is a high density of Welsh speakers in rural areas, and the activities of the Welsh Young Farmers' Clubs, particularly in those areas, **offer indispensable opportunities for young people to socialise and take part in a variety of activities in the Welsh language. They also offer opportunities nationally for those in areas where there are lower numbers of speakers to hear and use Welsh. Major cultural events such as the Urdd Eisteddfod and the National Eisteddfodau as well as the Tafwyl festivals and the Tawe Festival are important spaces for people to use the Welsh language socially.** By celebrating the Welsh language and culture, these events help to create a positive image of the Welsh language and do a great job of promoting the language and creating a sense of pride in it in communities, which can inspire more Welsh-language community activities and motivate people to learn the language.

In 2023, a Review of the Welsh Government's Grant Scheme to Promote and Facilitate the Use of the Welsh Language was published.⁷ As well as concluding that the grant scheme makes a significant contribution to achieving the *Cymraeg 2050* strategic objectives, the review made a series of recommendations to the Welsh Government as it plans a new funding model and structures for the grant scheme in the future.

Another development likely to influence this policy area in the future is the second phase of work of the Welsh Communities Commission. While the Commission's publications to date have focused on areas with a high density of speakers, the Commission's next phase will consider the situation of the Welsh language in areas with a medium or lower density of Welsh speakers. The Commission will submit a report and public policy recommendations to the Welsh Government in 2026 on how the number of Welsh speakers and usage in these areas could be increased.

Sport

There is little doubt about the **importance of sports in providing opportunities for people to use the Welsh language socially** as members of a team or club, whether as players, supporters, coaches, volunteers or referees. This is especially true for children and young people who participate in sport more than in any other activity outside school. Over the reporting period, **there has been a growing recognition of the need to strengthen opportunities to use Welsh in the sports sector.** The Commission for Welsh-speaking Communities highlighted the importance of ensuring that sports and leisure clubs make extensive use of the Welsh language when coaching children and young people in areas of higher density. The same applies in lower density areas where opportunities to use Welsh in sport are more limited, often due to a lack of awareness of participants' desire and ability to speak Welsh.

⁷ [Review of the Welsh Government's Grant Scheme to Promote and Facilitate the Use of the Welsh Language.](#)

The various sporting activities organised locally and nationally by the Urdd are crucial in this regard. The sports governing bodies that receive funding from Sport Wales also have an important role to play in influencing the use of the Welsh language in grassroots sport. The Welsh Language Commissioner has worked with governing bodies and other strategic partners in sport to encourage them to develop plans for the development of the Welsh language, and by the end of the period, four of them had been awarded the Cynnig Cymraeg recognition. At grassroots level, there have also been steps taken towards strengthening the use of Welsh in the community with Menter Iaith Gwynedd producing a pack to promote the Welsh language in sports clubs. The National Centre for Learning Welsh also formed a special partnership with the Football Association of Wales, the Welsh Rugby Union and Wrexham Football Club to increase the Welsh language skills of the club's players, staff and supporters. To support learners, apprentices and individuals working in sport who need greater confidence to use Welsh in professional sport-related settings, a package of sport e-learning resources tailored for Level 2 learners has been developed with funding from Coleg Cymraeg Cenedlaethol.

The importance of the sports sector in providing opportunities to use the Welsh language highlights the **need to put firmer structures in place to support the use of Welsh in grassroots sport**. Sport Wales' role in setting conditions relating to the Welsh language in the allocation of grants is crucial in this regard. There is a clear need to raise awareness of the Welsh language and ensure that training is available in Welsh in the various sports as well as to consider how to further support clubs at grassroots level to facilitate the use of the Welsh language in a fun and informal way.



A language for
socialising and
community



Promoting the Welsh language on the playing field is one of the aims of Ceredigion Hockey Club, which was established by a group of volunteers in the Aberystwyth area. The club provides opportunities for local children and young people to enjoy playing hockey in a friendly and inclusive environment, and to do so through the medium of Welsh.

This felt like the most natural approach for Gemma Cutter and her friends.



I work in the field of sport from day to day and I see how important it is in building confidence and friendship among young people. When we came together to establish this club there was a clear intention to create a setting where Welsh could be a natural language when playing sport. But at the same time, it developed organically because many of the coaches and children were already using Welsh as their main language.

Our hope is that this will also influence the children and that they, too, play naturally in Welsh, as that is the language they hear from us as coaches.

Naturally, a few challenges have come up along the way. Sometimes it is difficult to ensure that all the coaches speak Welsh, and that can create gaps in the language from time to time. But we also see this as an opportunity – the coaches who are not confident in Welsh have a chance to develop their language skills and become part of our culture.

We emphasise that all are welcome, and learners are an important part of the club. For many of the children, this is the first time they've been part of an environment where Welsh is used naturally, and they come from a variety of linguistic backgrounds.

The natural Welsh-language environment developed through sport is a great way for them to practice without pressure and to have a positive experience of the Welsh language and culture. Learners often benefit greatly from having role models in the coaches, and this helps build confidence and a sense of belonging to the club and the Welsh culture.

According to Gemma, there is great potential in using sport to promote the Welsh language in the wider community.



Activities outside school help Welsh to be a living language, not just taught in a classroom. Sport can play a key role in this – children use the language without overthinking it, which builds confidence and makes Welsh a natural part of everyday conversations.

Leisi is 11 years old and has been a member of the club for many years.



I love playing hockey and this club gives me the chance to do that every week and to learn more about the sport. I speak Welsh and English with my friends, but it's great to come to the club and be able to speak Welsh with everyone.

One of the parents, Charlie Priddy, is a Welsh learner and has recently come along to train with the hockey club.



I'm learning Welsh, and I see the club as a great opportunity to do that in a friendly and welcoming atmosphere. Playing with both teens and adults is a lot of fun, and it's a great workout too.

Culture and the arts

Organisations such as the Urdd and the National Eisteddfod also provide important opportunities to use Welsh socially when engaging with the arts. Both the **Urdd Eisteddfod and the National Eisteddfod continue to contribute extensively to Welsh language arts**, offering valuable opportunities for young people and adults to use the Welsh language as competitors and attendees. Through the financial support of the Welsh Government, the Urdd was able to offer free entry to low-income families to the 2025 Urdd Eisteddfod at Margam Park. **That year, the Urdd celebrated a record 119,593 entries to compete in over 400 competitions in 2025**, with a significant increase in the number of young Welsh learners taking part.

The importance of these festivals for new speakers or people interested in learning more about the language and its culture cannot be overstated. Research by the National Eisteddfod indicates that **more new Welsh speakers visited the 2025 Wrexham Eisteddfod than ever before**. Their research shows that the number of first-time visitors has more than doubled since the Monmouthshire and District National Eisteddfod in 2016 almost a decade ago – the last time the festival was held near the border. Notably, 17% of visitors reported that **visiting the Eisteddfod or taking part in community activities prior to the festival had helped them learn Welsh or inspired them to start learning the language**. This aligns with data from the National Centre for Learning Welsh which showed that the **number of people enrolling on a Welsh course in Wrexham was at an all-time high**.⁸

A key attraction of the national festival that appeals to all ages, and which is very important in trying to attract children and young people to the Welsh language as a contemporary language, is the opportunity to hear contemporary Welsh music. Smaller local gigs held in venues across Wales also provide crucial opportunities for people to come together to socialise and enjoy themselves in Welsh, and often serve as gateways for new speakers. A new generation of people composing and singing in Welsh is emerging alongside established artists. The popularity of songs such as 'Yma o Hyd' by Dafydd Iwan, boosted further by the success of the Welsh football team, demonstrates how Welsh music can broaden the language's appeal. Similarly, the decision of people who usually sing in English, such as Aleighcia Scott, to compose and sing in Welsh shows how the Welsh language can bridge diverse communities and cultural identities across Wales.

The Arts Council of Wales is the main third sector arts funding organisation in Wales, funding theatres, galleries, arts centres and a wide range of projects and events. Following the publication of key research in 2020 into the scale and strength of Welsh-medium arts activity across Wales, the Arts Council has taken steps to address the challenges and opportunities identified.⁹ One of the main findings of the research was that a proactive approach is needed to promote the Welsh language in the arts, including better data, support for bilingualism, and strategic collaboration.

⁸ Demand for Welsh lessons up in Wrexham as National Eisteddfod takes place | Welsh Government News (Accessed January 2026).

⁹ Arts Council Wales, Welsh Mapping Project (May 2020).

A major development during the reporting period was the Arts Council’s strategic decision to require organisations receiving its grants to develop Welsh language development plans.

As a result, 34 arts organisations now have structured plans to increase the use of Welsh in their work. From 2027 onwards, **all eligible organisations will be required to attain the Cynnig Cymraeg recognition from the Welsh Language Commissioner in order to receive a grant from the Arts Council of Wales.** This will build on the 29 arts organisations across Wales that already hold the Cynnig Cymraeg. The Cynnig Cymraeg provides a structured framework to support organisations in developing and reporting on the Welsh language services and activities they offer. Organisations subject to statutory Welsh-language standards are not eligible to work towards the Cynnig Cymraeg.

Another important development during the reporting period was a commitment in the Programme for Government 2021–26 to engage with the arts, culture and heritage sectors in Wales to develop a **new culture strategy for Wales.** Offering cultural activities through the medium of Welsh is essential for creating more opportunities for people to use Welsh. Sectors such as the arts, literature, music and the performance industries are vital to conveying Wales’ rich cultural heritage, supporting economic growth and expanding opportunities to work through the medium of Welsh. **Ensuring the development of a clear strategy and adequate levels of investment in culture is, therefore, crucial for the long-term vitality of the Welsh language.**

Following significant delay, the Welsh Government published a consultation on priorities for culture 2024–30. Following the consultation, the Senedd’s Culture Committee expressed their concerns about the lack of detail in the consultation document, particularly around budget, responsibilities and timetables.¹⁰ The committee noted that these concerns reflect wider concerns about the lack of strategic investment in culture in Wales. For example, government figures show that **spending on culture in Wales is significantly lower than in most European countries.**¹¹

Cuts to the Books Council’s budget, as in the case of the Arts Council, the National Library of Wales and Amgueddfa Cymru – National Museum Wales, have led to concerns about the viability of the Welsh language books publishing sector, a sector where public funding is vital to ensure its success. Welsh language books give expression to Welsh language culture and the experiences of its speakers and are essential in order to reinforce people’s language skills. The sector is also an important employer and provides Welsh-language working environments across Wales. Current policy direction in this sector **suggests that the contribution of the publishing industry to language planning is not being fully acknowledged or prioritised.**

¹⁰ Letter from the Culture, Communications, Welsh Language, Sport and International Relations Committee to the Cabinet Secretary for Culture, Social Justice, Trefnydd and Chief Whip regarding draft priorities for culture in Wales 2024 to 2030. (September 2024)

¹¹ The Welsh Government’s priorities for culture: When is a strategy not a strategy?.

5-Year Promotion Strategies

To comply with Welsh language standards, local authorities and national parks must produce **5-year strategies explaining how they will promote the Welsh language and facilitate its use** in their areas. These strategies must include clear targets to increase or maintain the number of Welsh speakers, along with an explanation of how these targets will be achieved. Each strategy must be reviewed at the end of every five-year cycle, with a revised version published accordingly.

The aim is that the promotion strategies provide a clear framework for local action to increase the use of Welsh and the number of people who speak Welsh, connecting local policies to national priorities. They should be vehicles for planning community, cultural and sporting activities locally to meet the linguistic needs of Wales' diverse communities. Their **main objective is to create an environment where the Welsh language is visible, accessible and a natural part of everyday life, ensuring that there is an increase in opportunities for people to use the language.**

The Welsh Language Commissioner is responsible for ensuring that these strategies are produced. To support this work, the Commissioner has published an advice document for organisations¹² and commissioned an independent study to evaluate how organisations have assessed the achievement of their 5-year strategies.¹³ The evaluation highlighted examples of good practice, but it also revealed significant variation in how success was assessed. This highlighted the **need for more specific guidance and training on assessing the achievement of strategies** and in the collection and use of quantitative and qualitative data to formulate the strategies and set realistic targets.

The Welsh Language and Education (Wales) Act 2025 places a duty on Welsh Ministers to review the promotion standards and determine whether there is potential to amend them to facilitate the achievement of the Government's targets on increasing social use of the Welsh language. **This creates an important opportunity to consider how the role of the promotion strategies as strategic tools for robust community language planning in Wales could be developed and strengthened.**

Although the promotion standards provide an important foundation for language planning, they do not currently set clear expectations with regard to the content of the strategies, nor do they provide a specific process for monitoring and scrutiny. As a result, the full potential of these strategies as a vehicle for community language planning has not yet been fully realised. A recent report by the Commission for Welsh-speaking Communities recommends reviewing and expanding the standards to maximise their impact, particularly in areas with a high density of Welsh speakers.

¹² Welsh Language Commissioner, [Standards relating to promoting the Welsh language: 5-year strategies: a best practice guide for county and county borough councils and national park authorities](#).

¹³ Welsh Language Commissioner, [Promotion standards: assessing the achievement of the 5-year strategies, effective practice guidance document \(April 2021\)](#).

1.3 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

The latest evidence suggests that **little has changed over the past decade in how often the population speaks Welsh**. The evidence clearly shows that **increasing social use of the Welsh language remains a significant challenge**. It seems that Welsh speakers do not consistently take advantage of opportunities to use Welsh when socialising with their extended family, friends, or in their local community.

This is **particularly apparent when it comes to children and young people’s use of Welsh outside school**. The evidence shows that children and young people are far more likely to use Welsh at school, while social use of the language outside school gates appears to be limited.

The evidence shows that **social use of the Welsh language is consistently much higher among fluent Welsh speakers**, among those who have **learnt Welsh at home**, and in **areas with a higher density of speakers**.

There are fewer fluent Welsh speakers today than there were a decade ago, there has been a significant shift from home to school as the main source of new Welsh speakers, and we know that the density of speakers in traditional Welsh strongholds is declining. Together, these **trends in the demographics of Welsh speakers today do not support efforts to increase the use of the language**.

Although this section of the report focuses specifically on increasing the use of Welsh, it must be emphasised that there is **an integral relationship between increasing the number of Welsh speakers and increasing language use**. Increasing language use would be a much easier task in a situation where the majority of the population is able to speak Welsh. It is therefore important to bear in mind the relevance of significant developments in education and skills over the reporting period to the efforts that exist to increase the use of Welsh.

Despite the challenges highlighted by the evidence, **it is essential to acknowledge the significant and important work undertaken by many organisations to increase opportunities to use Welsh**. Without the efforts of bodies such as the mentrau iaith, the Urdd, and the National Eisteddfod, the position of the Welsh language would undoubtedly be more fragile. But there is no doubt that the latest evidence shows once again the scale and complexity of the challenge that exists to ensure that Welsh is a living language, used as a natural part of community life across Wales. There is a **genuine risk that an increasing proportion of children and young people see Welsh solely as the language of education**, and there is a real need for more bold and ambitious interventions in community language planning.

In terms of strengthening community language planning frameworks there is **clear potential to strengthen the promotion standards as a more effective vehicle for community language planning**. Although local authorities and national parks in Wales are already required to produce 5-year strategies for promoting the use of the Welsh language, the potential of these strategies is not yet being fully realised. These strategies **have the potential to make a significant difference to the way in which opportunities to use the Welsh language socially are planned and implemented**.

Priority



There must be far more opportunities, especially for children and young people, to use the Welsh language in communities, and to take part in cultural, community and sporting activities. To achieve this, and as recommended by the Commission for Welsh-speaking Communities, the Welsh Government must strengthen community-based language planning frameworks and increase the funding and resources available to key partners responsible for delivering these activities and events in Welsh.

The Commissioner should therefore be given greater responsibilities to monitor and assess strategies, provide recommendations to bodies, share good practice and review the success of the strategies annually, as well as producing a report and recommendations to the Welsh Government at the end of the strategy period.

In addition to strengthening the planning framework, **additional resources should be provided to key partners such as the mentrau iaith, the Urdd, Mudiad Meithrin, the National Eisteddfod and sports clubs** – to enable them to implement key elements of these strategies.

2. Broadcasting, media, and technology

The mass media play a crucial role in strengthening the visibility of the Welsh language and creating opportunities for people to hear and use Welsh in their daily lives. Welsh-language broadcasting and media not only reflect the experiences, aspirations and identities of Welsh speakers, but also help attract new speakers to the language.

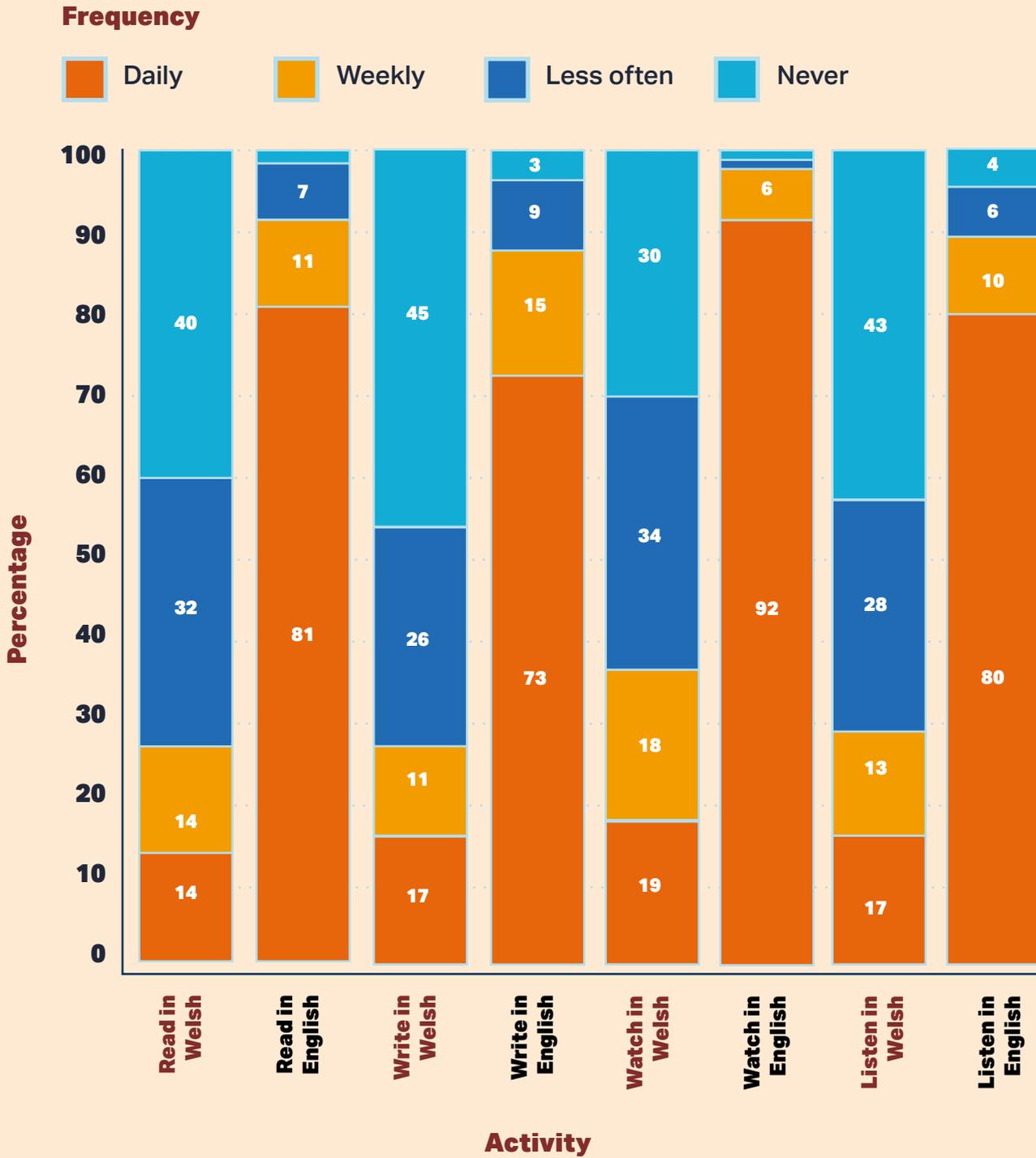
This role is even more important given the central place that digital media and technology now hold in contemporary life. It is inevitable that social media, online content creation and consumption, and artificial intelligence will become increasingly significant factors in future language planning.

2.1 The evidence

Using Welsh when watching, reading, and listening

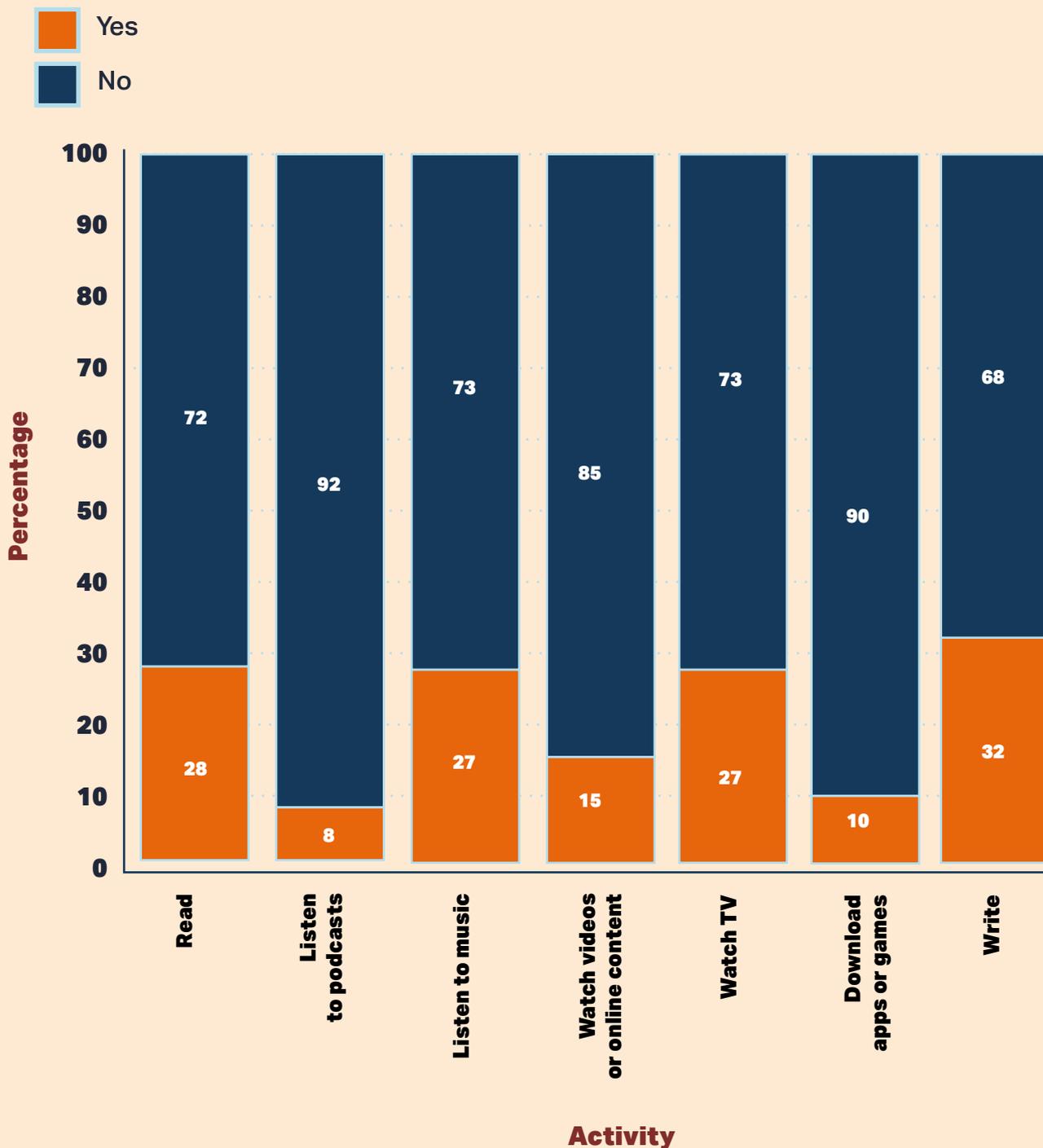
The Language Use Survey provides information on the use of Welsh in reading, writing, watching and listening. Chart 17 shows that Welsh speakers are far more likely to read, write, watch and listen in English than in Welsh.

Chart 17: Proportion of Welsh speakers who use Welsh or English skills outside work



The Welsh Language Commissioner’s research report looked in more detail at children and young people’s use of the Welsh language outside school. Out of all the respondents, around 32% reported writing in Welsh, 28% reading in Welsh and 27% listening to music and watching TV in Welsh. A smaller proportion of respondents reported watching videos or online content in Welsh (15%), downloading apps or games in Welsh (10%), or listening to podcasts in Welsh (8%).

Chart 18: The percentage of respondents who carry out the following activities through the medium of Welsh outside school



(Source: Welsh Language Commissioner’s Survey on the use of Welsh amongst children and young people, 2025)

As with the Language Use Survey results, we see that the percentages who carry out the activities in Chart 18 through the medium of Welsh increase significantly when looking at fluent Welsh speakers and those who learnt Welsh at home as young children. For example, while 27% of the entire sample watched television in Welsh, this increased to 42% among fluent Welsh speakers, and to 61% among those who learnt Welsh at home.

Key conclusions

- Welsh speakers **are far more likely to read, write, watch and listen in English** than in Welsh.
- **Children and young people** report that they are **more likely to use Welsh** when **writing, reading, watching TV and listening to music** compared to using Welsh **online, downloading apps or games, or listening to podcasts**.

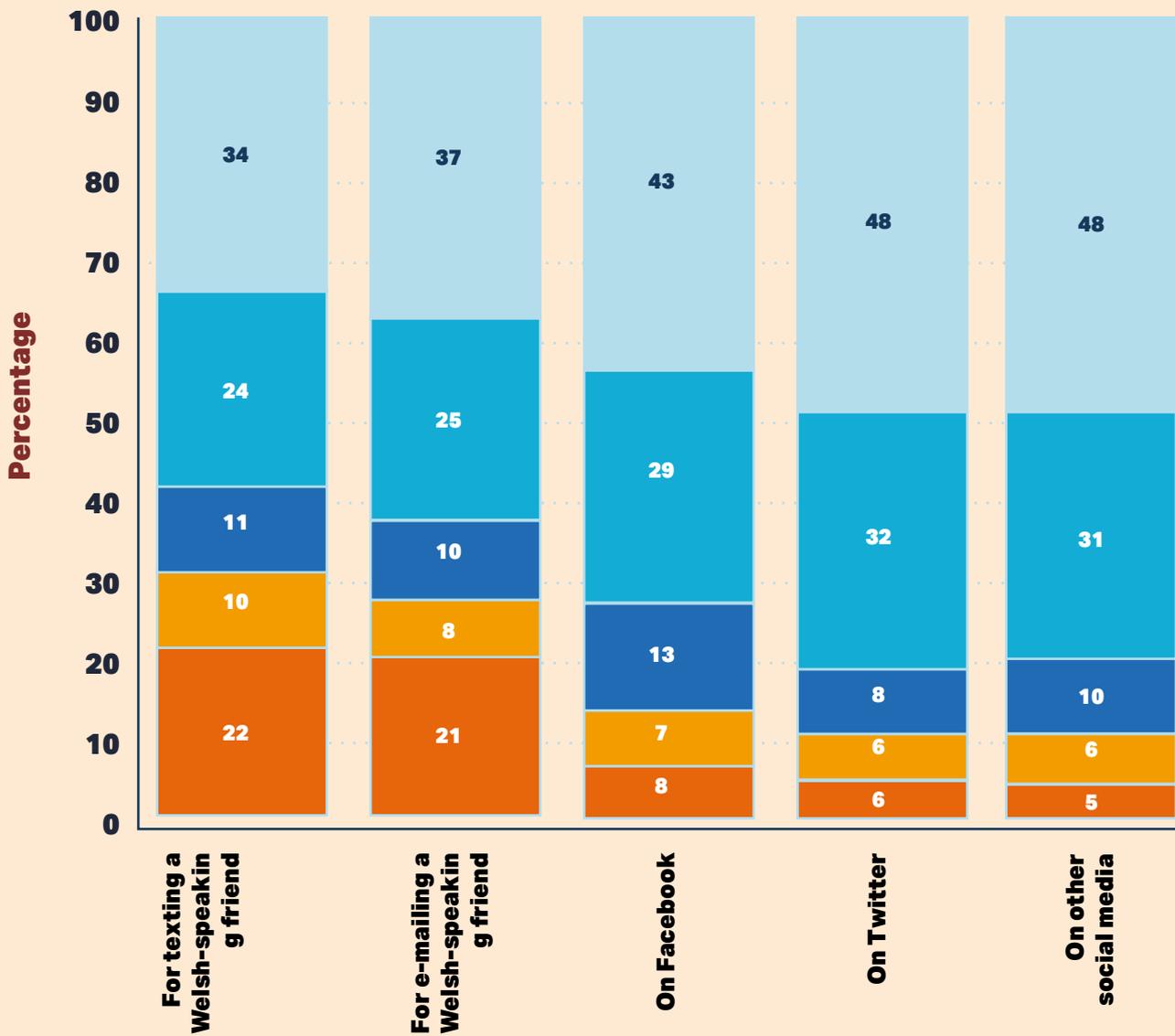
Digital use of Welsh

The Language Use Survey also provides some evidence regarding the digital use of Welsh. As shown in Chart 19, just under a third of Welsh speakers always or mainly used Welsh when texting or emailing a Welsh-speaking friend. A lower proportion of respondents always or mainly used Welsh when using social media.

Chart 19: Language used on digital media by Welsh speakers

Language

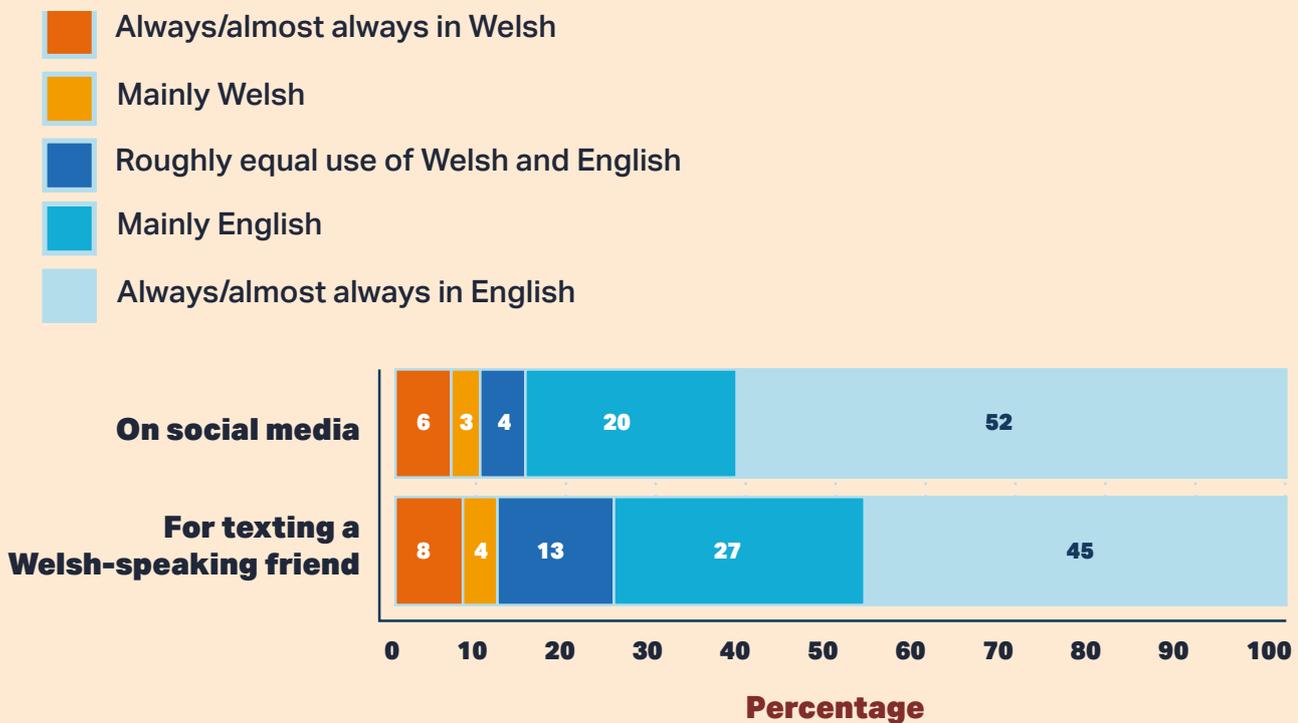
- Always/almost always in Welsh
- Mainly Welsh
- Roughly equal use of Welsh and English
- Mainly English
- Always/almost always in English



(Source: Welsh Language Use Survey 2019–20)

As with adults’ use of Welsh, Welsh-speaking children and young people were **more likely to use Welsh when texting than when using social media**. However, only 12% of children and young people used Welsh always or mainly when texting a Welsh-speaking friend, compared to 33% of adults. A lower proportion of children and young people also indicated that they always or mainly use Welsh on social media.

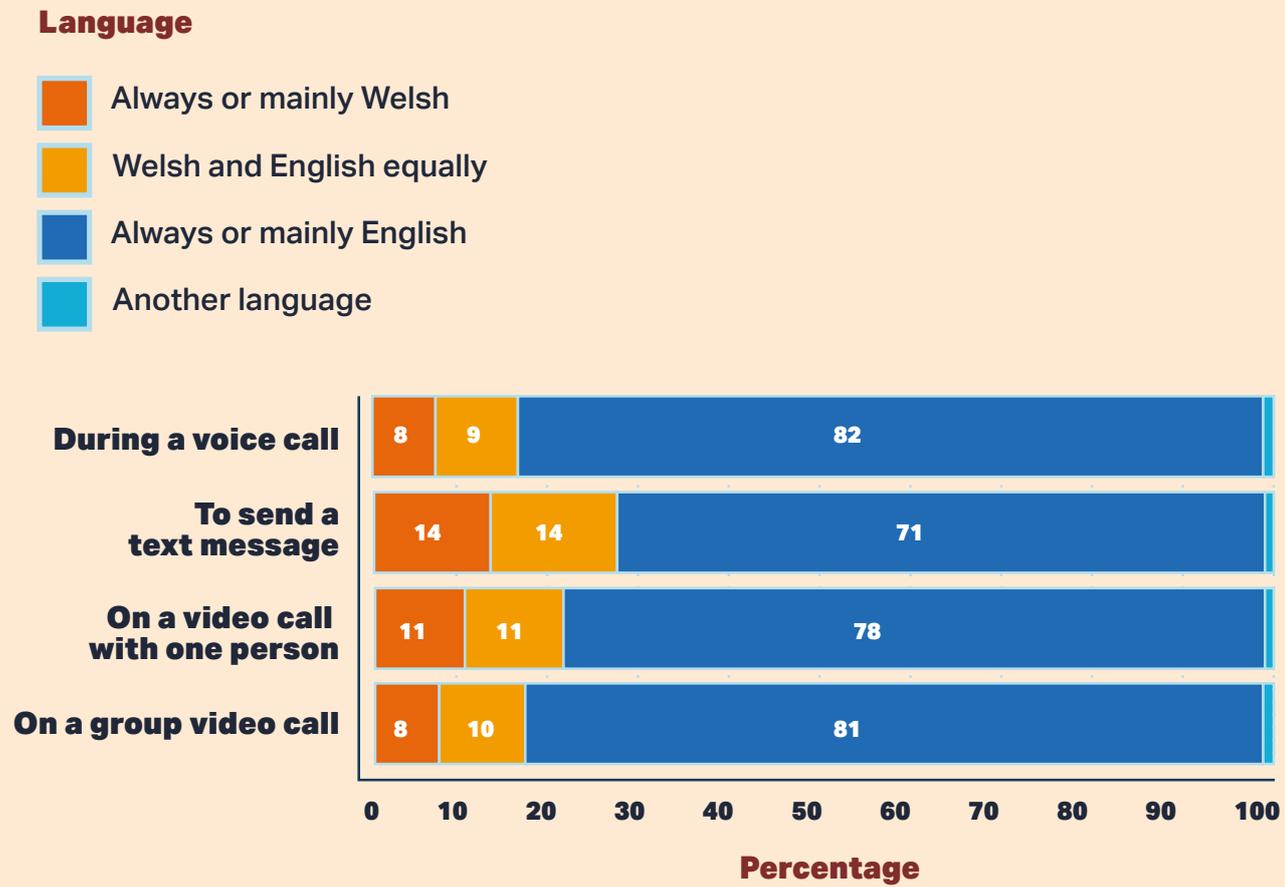
Chart 20: The use of Welsh by Welsh-speaking children and young people on digital media



(Source: Welsh Language Use Survey 2019–20)

The results in Chart 20 regarding children and young people’s use of digital media through the medium of Welsh are relatively consistent with the conclusions of the Welsh Language Commissioner’s research report. For example, it was found that 14% of respondents indicate that they always or mainly use Welsh when texting family and friends who speak Welsh.

Chart 21: Respondents’ use of language on digital media when communicating with Welsh-speaking family and friends

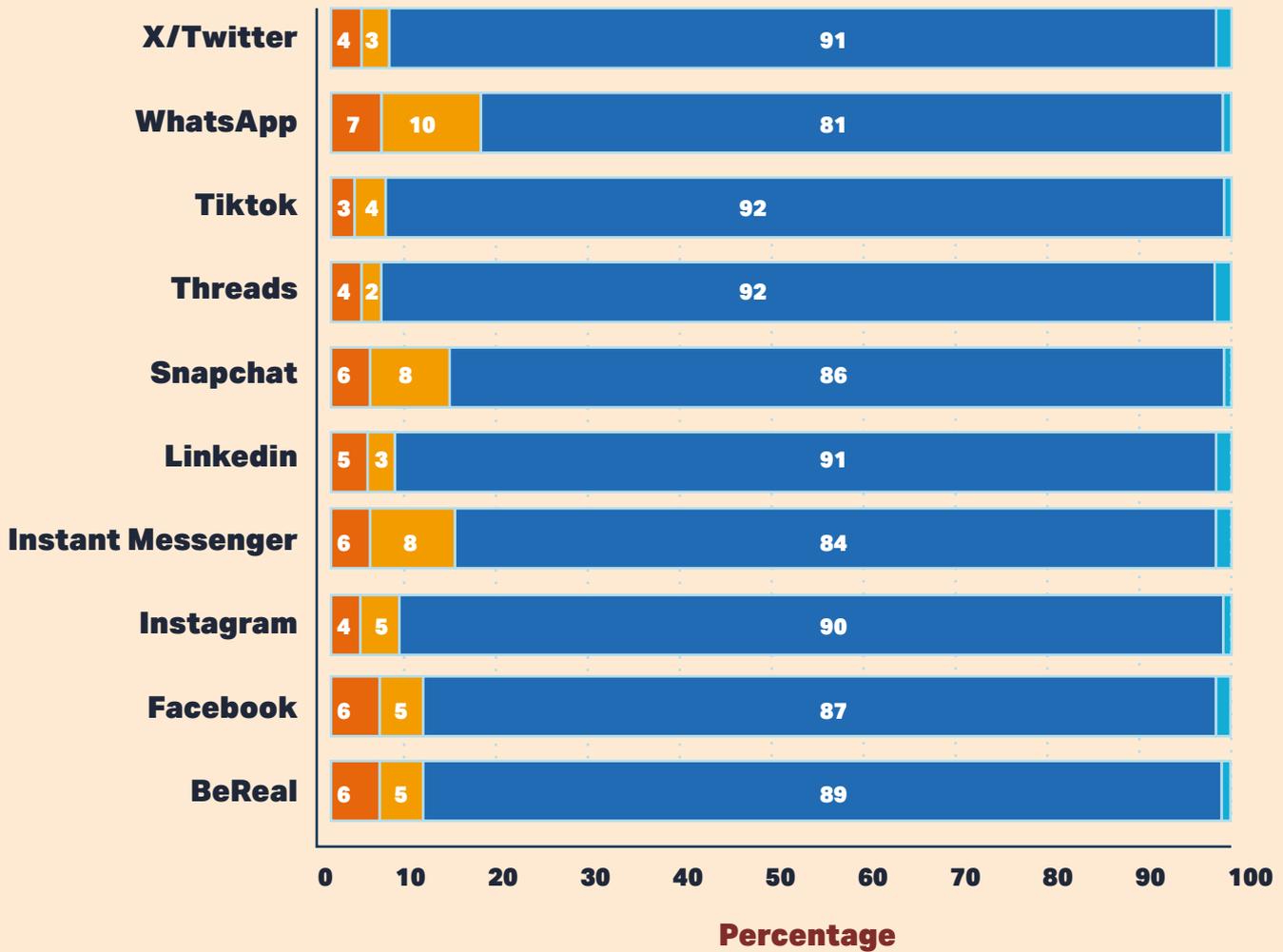
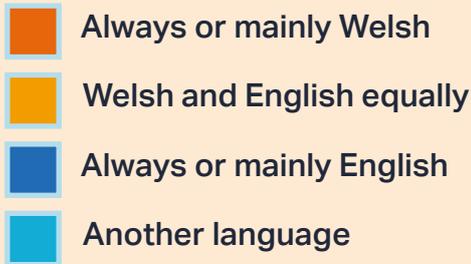


(Source: Welsh Language Commissioner’s Survey on the use of Welsh among children and young people, 2025)

The Commissioner’s report also provides more detailed evidence on the use of the Welsh language in online and social media communications. Chart 22 shows that the percentage of respondents who always or mainly use Welsh is very low overall, and significantly lower than the percentage who use the language more generally, and when messaging through text, for example.

Chart 22: Respondents' use of language when using different social media platforms

Language



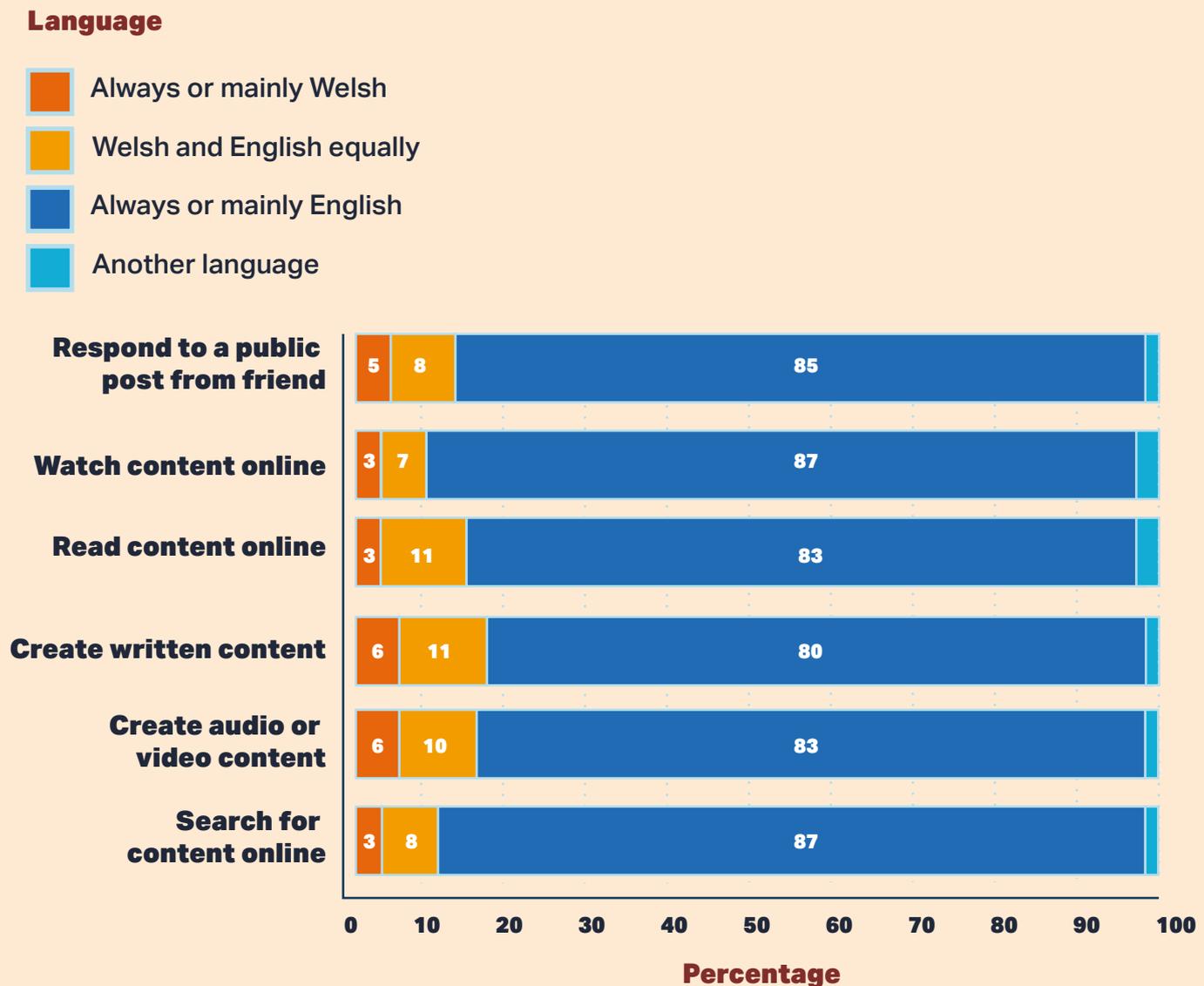
(Source: Welsh Language Commissioner's Survey on the use of Welsh among children and young people, 2025)

When looking at the use of Welsh across different digital platforms, WhatsApp topped the list, with 17% of those using the platform stating that they use Welsh always, mainly, or Welsh and English equally. This was followed by Instant Messenger (14%) and Snapchat (14%).

The percentages indicating that they use Welsh on different platforms rise significantly for fluent Welsh speakers and those who learnt Welsh at home. For example, the percentage indicating that they use Welsh always, mainly, or Welsh and English equally on WhatsApp is 17% for the whole sample, 34% for fluent Welsh speakers and 60% for those who learnt Welsh at home.

These trends can also be seen when looking at the wider use of the Welsh language among children and young people when communicating and creating or using content online.

Chart 23: Respondents’ use of language when communicating online and on social media



(Source: Welsh Language Commissioner’s Survey on the use of Welsh among children and young people, 2025)

As shown in Chart 23, a relatively low percentage of respondents use Welsh in online communication and in creating and using content online. Patterns of Welsh-language use vary considerably when the data is analysed according to specific characteristics. For example, the use of Welsh on social media and online increases significantly among fluent Welsh speakers. In fact, across every type of online activity measured, the percentage of respondents using Welsh is markedly higher when looking at fluent Welsh speakers only.

This overall increase is most evident when looking at those individuals who have acquired Welsh at home as young children. Looking at the category ‘creating written content’ as an example, we see that the percentage who use Welsh always, mainly, or Welsh and English equally is 17% for the sample as a whole, the percentage increases to 32% for fluent Welsh speakers, and increases to 48% for those who learnt Welsh at home.

Key conclusions

- Welsh speakers **are less likely to use Welsh on digital and social media** compared to using Welsh in person or when texting.
- These trends are **even clearer among children and young people**. There seems to be a **digital shift towards English as the default language** for most children and young people both online and when using social media.

2.2 Main developments

Broadcasting and media

In 2023 the Welsh Affairs Committee published their report on Broadcasting in Wales.¹⁴ While the report concludes that broadcasting in Wales has been a remarkable success story, it also warns that **public service broadcasters are too slow in adapting to developments in the global broadcasting revolution**. Some of these developments include significant changes in people’s viewing habits and the popularity of digital streaming. The committee also expressed concerns about ensuring that national sporting events are broadcast free of charge. The committee warns that a **lack of reform and investment would lead to a ‘digital extinction’ of Welsh culture and the Welsh language**.

The passing of the **Broadcasting Act 2024** marked one of the most significant reforms to UK broadcasting law in decades, and directly addressed many of the challenges outlined in the Welsh Affairs Committee’s report. The act aimed to modernise the broadcasting framework, introducing greater flexibility for public service broadcasters to respond to contemporary viewing patterns and developments in digital broadcasting. For the first time, **broadcasting law**

¹⁴ Welsh Affairs Committee, *Broadcasting in Wales* (October 2023).

establishes the Welsh language as an essential part of public service broadcasting in the UK. The act contains a number of important provisions in relation to broadcasting through the medium of Welsh, including:

- expanding S4C's statutory remit to include digital and online platforms
- removing the previous geographical restrictions which will enable S4C's Welsh language content to reach audiences across the UK and beyond more easily
- ensuring that Welsh-medium apps and offerings are better promoted and have a prominent place on smart TV and streaming platforms
- safeguarding listed sporting events
- providing clarity on S4C's ability to generate commercial income and to invest in new content and technology
- strengthening accountability and governance of the channel
- introducing greater flexibility to collaboration arrangements between the BBC and S4C.

Although the act significantly strengthens the legal foundation of broadcasting through the medium of Welsh, **one of the less positive outcomes of the act is that Ofcom no longer has the ability to require commercial radio services to provide services through the medium of Welsh.** As a result, some commercial radio services have chosen to cease broadcasting through the medium of Welsh in recent years.

A more positive development in terms of radio broadcasting was the decision of the BBC Board **to expand the provision of the Radio Cymru 2 service.** Following a period of piloting the extended provision since 2022, Ofcom approved a request from the BBC for the channel to receive status as a Public Broadcasting Service in its own right in 2024.

This example further illustrates how strongly Welsh-language broadcasting depends on services funded through public investment. Despite the importance of the Broadcasting Act 2024, **the funding model of public broadcasting in the UK is a separate matter.** It is currently unclear how the BBC, including its Welsh-language services and S4C, will be funded in the future. The uncertainty regarding the future of public service broadcasting funding arrangements through the licence fee presents real dangers to the future of the Welsh language and culture. At the end of the reporting period the UK Government published a green paper on its **review of the next BBC Charter which includes consideration for the future of BBC and S4C funding.**

Digital technology

Digital technology is increasingly important to all aspects of life, and artificial intelligence (AI) is developing rapidly in ways that will undoubtedly reshape how we communicate with each other and interact with the world around us. As a result, **language technology is a subject that has grown in relevance, importance and profile over the reporting period.**

The Welsh Government is leading the strategic efforts to improve Welsh language technology and the **Welsh Language Technology Action Plan** published in 2018 has been the basis for significant developments over the reporting period. The plan outlined a series of practical actions across key areas of language technology, including speech technology, machine translation, and AI, with the aim of creating a robust linguistic infrastructure for the Welsh language in the digital world.

A final report on the implementation of the scheme was published in 2024¹⁵ which provides an overview of what has been achieved to ensure that the Welsh language is in a position to respond quickly to developments in the digital world, including AI. One of the most significant advances was the collaboration between Welsh Government, Bangor University and OpenAI on Welsh language models for GPT-4. The aim being to ensure that AI platforms such as ChatGPT work easily through the medium of Welsh. Welsh Government also provides a grant to Bangor University to further develop Welsh language technology, including improving its text-to-speech bilingual voices, the Trawsgrifiwr, and Welsh language speech recognition. The Welsh Government has now published their priorities for Welsh language technology and AI which focus on improving Welsh language technology, improving access to Welsh technology, and improving Welsh language and speech technologies.¹⁶ The Commissioner has agreed to work with the Welsh Government to achieve these priorities, including by making the Iaith Gwaith logo even more prominent in the digital world, so that people feel more confident to start more conversations and use more digital services in Welsh.

The Welsh Government has continued to work with Microsoft to ensure that the Welsh language can be used freely across its products, including the development of a tool to enable human simultaneous translation in Microsoft Teams meetings and developing Copilot in Welsh. They are also collaborating on a broader business case involving over 30 features to improve how Microsoft products work in Welsh. Given the importance of virtual meetings and the potential of AI such as Copilot to the world of work today, these developments represent a major step forward in facilitating the use of Welsh in professional settings. The Government has also shared a collection of free Welsh Government translation memories on BydTermCymru and released Cysgliad (a software package that includes a spell checker and a collection of dictionaries) free of charge to organisations with fewer than ten members of staff, and to the entire education and third sector.

Another significant development during the reporting period was the establishment of the **Centre for Digital Public Services** in 2020. The centre is responsible for supporting people, teams and organisations to build high-quality public digital services. The centre has published the Digital Services Standards for Wales, a framework that defines good digital public service in Wales. It was positive to see that the **design of services in Welsh and English was included as one of the 12 standards**, and that **meeting the needs of Welsh speakers must be an integral part of the design of high-quality digital services in Wales**. They have also published a trio-writing methodology in collaboration with the Welsh Government; guidance which describes an approach to working together to effectively create content in both languages in a way that focuses on the user experience.¹⁷

¹⁵ [Welsh language technology action plan: final report 2018 to 2024 | GOV.WALES.](#)

¹⁶ [Welsh language technology and AI | GOV.WALES.](#)

¹⁷ Centre for Digital Public Services, [How to do trio writing](#) (Accessed January 2026).

2.3 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

There's **no doubt that technology is changing the way people spend their time and communicate with each other.** Advances in technology and artificial intelligence are happening at pace and will, undoubtedly, further influence how we communicate, socialise and work in the future.

There is no denying that the evidence we have regarding the **use of the Welsh language in mass media and digital technology is a cause for concern.** While increasing the use of Welsh is a significant challenge, this challenge is even greater in the context of social and digital media. The evidence shows that **Welsh speakers are less likely to use Welsh online, and on digital media,** compared to using Welsh in other social contexts.

These trends in language use are even more pronounced among children and young people. Digital media is becoming increasingly prominent and central to children's lives today, yet for most, the default digital language is English. The evidence clearly points to **a digital shift towards the use of English as the language of communication online and on social media.** Unfortunately, these trends are not surprising given that the Welsh language exists alongside a dominant language in global popular culture, especially considering the influence of English-language broadcasting and media.

While there are clear challenges to increasing the use of Welsh online and on social media, it is also true that **advances in technology and AI offer exciting opportunities to increase the use of Welsh.** Ensuring that Welsh is fully embedded within technological advances and AI is key, but there should also be more focus on **changing the attitudes and behaviours** of children and young people. Action is needed to change the attitudes and practices of Welsh speakers online, including teaching and increasing awareness of how to use Welsh on different platforms, and the **creation and use of Welsh-language content of all kinds needs to be encouraged and facilitated.**

Rather than viewing technology and AI as a threat to the Welsh language, we should embrace the fact that this **technology can make it easier for people to use Welsh in all aspects of their lives,** including when communicating with friends and audiences who may not themselves speak Welsh.

Priority



Key partners must work together to develop a full understanding of the challenges and opportunities involved in increasing the use of Welsh in digital media and broadcasting. Building on this collaboration, a national digital strategy, led by the Welsh Government, should be developed outlining the key contributions of all partners.

3. Economy, housing, and town and country planning

The relationship between housing, work and language has long been a central focus of language-planning efforts in Wales. This is particularly true in areas considered traditional strongholds of the Welsh language.

Strengthening the socio-economic infrastructure of Welsh-speaking communities is absolutely crucial both for increasing the number of Welsh speakers and increasing social use of the language. The key challenge is ensuring that people have good-quality jobs, attractive careers, and suitable housing so that they can remain in, or return to, their communities. Ultimately, these factors have the greatest influence on crucial issues such as language transmission between generations and everyday social use of Welsh within Welsh-speaking communities.

3.1 Main developments and evidence

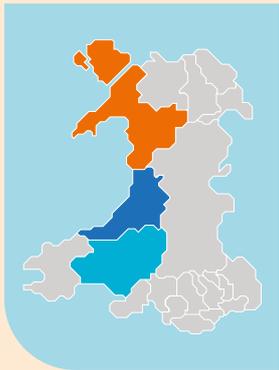
As already noted, the results of the latest census prove that **areas with the highest density of Welsh speakers are under increasing pressure**. For example, in the four local authorities with the highest percentage of Welsh speakers, there has been a significant decline in the percentage of Welsh speakers between 1981–2021.

The percentage of Welsh speakers has fallen by 9.5 percentage points in Gwynedd, 5.2 percentage points in Anglesey, 17.9 percentage points in Ceredigion, and 19.1 percentage points in Carmarthenshire.

Although there has been an increase in the population of most Welsh local authorities between 2011 and 2021, we know that the **population of Gwynedd, Anglesey and Ceredigion has decreased** in the same period. It is therefore not surprising that there has been a decrease in the number of Welsh speakers in these areas. Although Carmarthenshire's population has increased since 2011, this is the county where the largest decline in the number and percentage of Welsh speakers has been seen since 2011.

The Prosiect Bro¹⁸ analysis provides us with a more detailed picture of these trends in the areas concerned.

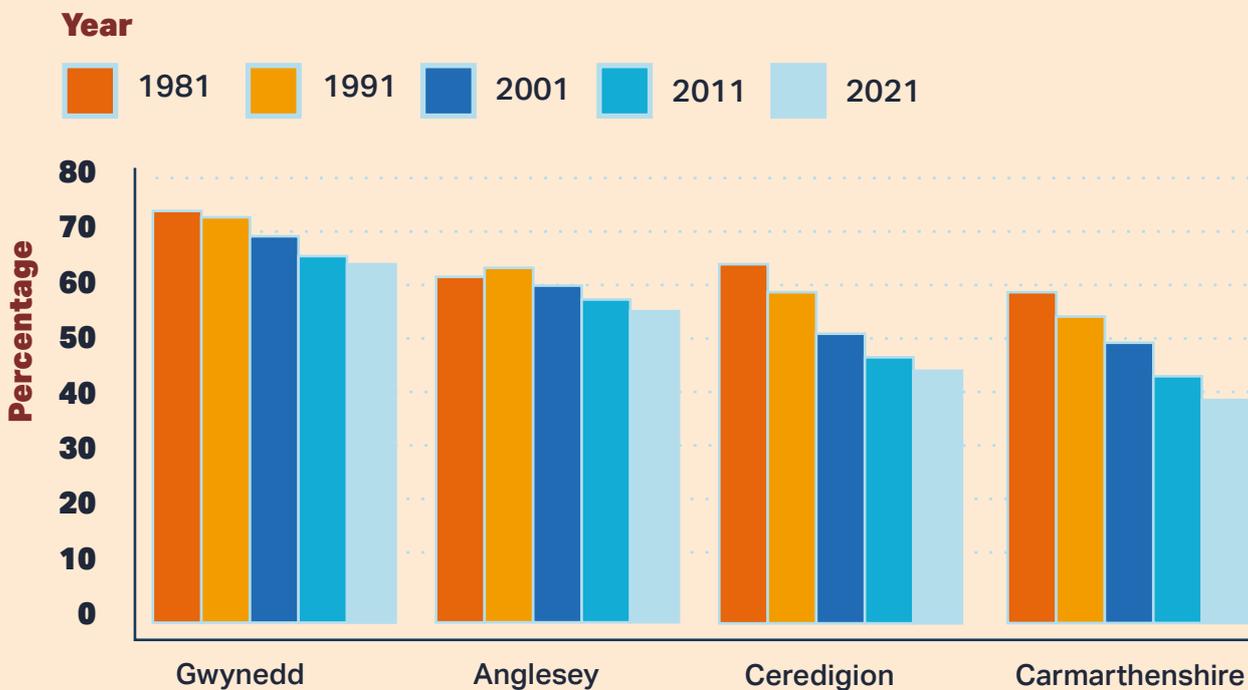
¹⁸ BRO Project Compendium of Census 2021 Language Statistics.



In the four local authorities with the **highest density of Welsh speakers, there were a total of 268 small areas** comprising between 400 and 1,200 households in each.

In 252 (or 94%) of these small areas there was a decrease of between 1 and 21% percentage point in the percentage of Welsh speakers between 2011 and 2021.

Chart 24: Percentage of Welsh speakers by local authority between 1981–2021



(Source: Office for National Statistics)

Although the population of Gwynedd, Anglesey and Ceredigion has declined since 2011, we also know that the proportion of the population of these areas born outside Wales is higher than the national average. While 71% of the population of Wales were born in Wales, the figure for Gwynedd and Anglesey is 66%, and for Ceredigion the figure is 53%. It is therefore clear that there is **significant in-migration from outside Wales to these areas**, and we know that a very high proportion of those who have migrated to Wales indicate that they are unable to speak Welsh. In Gwynedd for example, 87% of those born in Wales can speak Welsh, while only 21% of those born outside Wales can speak the language.

The discussion of the census results, together with an analysis of the evidence on the social use of the Welsh language, clearly highlights the **significance of these areas to the future of the Welsh language**. These are not only the areas with the highest percentages of Welsh speakers, they are also the areas where Welsh speakers are most likely to use the language and pass it on to the next generation.

Although the **reasons for the decline of the Welsh language in these areas** are complex and multifaceted, there is no doubt that **significant structural and economic challenges, outward migration and migration trends, second homes and a lack of adequate housing, play a central role**.

Economy and the Welsh Language

While there is a consensus on the significance of the link between language and economy, it is fair to note that there is little evidence showing the direct impact of economic policies and trends on the vitality of a minority language.

However, the Commission for Welsh-speaking Communities argues that one of the reasons that communities with a high density of Welsh speakers are seeing a steady decline in the number and percentage of speakers is that they **‘face significant structural challenges**, including an ageing population and a continuous out-migration of young people’.¹⁹

The Commission has emphasised the significance of the fact that a **large proportion of young people are leaving the areas with a high density of speakers, and that this is an economic and structural challenge for Welsh-speaking communities**. According to the Commission, these challenges include:

- weak transport infrastructure
- a labour market that does not always meet the needs of industry
- productivity levels that are lower than most of the rest of the UK
- underemployment and low wages.

These challenges mean that there are fewer economic opportunities to attract young people to stay or return to these communities, which in turn, further intensifies the challenges to creating an attractive and prosperous economy.

The fact that more than a quarter of Welsh undergraduates study outside Wales makes it more difficult to ensure that young people with a high level of skills return to their communities and contribute to the local economy.

Supporting the socio-economic infrastructure of Welsh-speaking communities is one of the core objectives of *Cymraeg 2050*. The strategy emphasises the importance of developing a prosperous and sustainable economy to sustain and strengthen those communities where there is a high density of speakers.

As part of the Co-operation Agreement between the Welsh Government and Plaid Cymru, in October 2022 a **further investment of £11m was announced for phase 2 of the ARFOR Programme**. The intention was to build on the first phase of the programme, together with the findings of the independent evaluation of the ARFOR 1 programme. The main aim of the programme is to support the economy of the areas with the highest density of Welsh speakers within the boundaries of the local authorities of Ceredigion, Gwynedd, Carmarthenshire and Anglesey. Some of ARFOR 2's successes to date include:

- support for 1951 young people to stay or return to their communities, supporting them to succeed locally through initiatives or career development
- 19 new initiatives receiving support, and 64 existing initiatives receiving support
- 73 businesses increasing their use of the Welsh language.

¹⁹ Commission for Welsh-speaking Communities, *Empowering communities, strengthening the Welsh language* (August 2024).

The initial review of ARFOR 2 was published in October 2024, and some of the early findings conclude that the programme is succeeding in achieving some of its key objectives, but that there is also a need to consider targeting specific businesses and sectors more strategically.

Despite the importance of the ARFOR programme, it must also be recognised that this investment is modest given the Welsh Government's wider economic development budget. For example, the **City and Growth Deals provide multi-billion pound investment** and provide a strategic direction for economic development across the whole of Wales over a period of 15 years. It is revealing that the finding of a research report by Aberystwyth University was that the Welsh language was a very marginal consideration in the development of growth deals in north, mid and south-west Wales.²⁰ According to the report, the long-term impact of the City and Growth Deals will be very significant given the high levels of public and private investment involved, **however, they do not appear to give serious consideration to the ARFOR programme, nor to the Welsh language.**

Since summer 2024 the Welsh language standards place a duty on the corporate joint committees, which implement the city and growth deals, to consider the effects of policy decisions on the Welsh language. This requirement should ensure that the **joint committees give conscientious consideration to the Welsh language when making strategic and budgetary decisions.** This is particularly relevant given that past economic development strategies and structures have not focused much on the needs of communities with a high density of Welsh speakers.

One important industry that has experienced significant change over the reporting period is the agriculture sector. It remains the employment sector with the highest proportion of Welsh speakers in Wales, and **agricultural businesses continue to sustain many rural communities where Welsh is spoken naturally on a daily basis.**

Following the United Kingdom's decision to leave the European Union, support for farmers through the Common Agricultural Policy came to an end, posing a clear threat to the sustainability of the industry. In response to this far-reaching change the **Agriculture (Wales) Act 2023** was passed. As part of the act the Government has been developing the **Sustainable Farming Scheme**, which sets out how farmers will receive financial support from 2026 onwards.

The impact assessment of the Sustainable Farming Scheme on the Welsh language recognised the importance of the agricultural sector to the vitality of the Welsh language, and acknowledged that changes to the system of support could have a negative impact on those communities. Following widespread opposition to the first version of the Sustainable Farming Scheme, it was decided to postpone the introduction of the scheme for a year, and a new version proposing fewer changes, and therefore more stability, to the industry was introduced in Spring 2025.

Planning, housing and Welsh language communities

The COVID-19 pandemic period highlighted **housing problems in areas with a high density of Welsh speakers.** A combination of factors, including an increase in the number of second homes and holiday accommodation, rising house prices, and higher levels of in-migration, **have made it increasingly difficult for local people, especially young people, to buy or rent homes in**

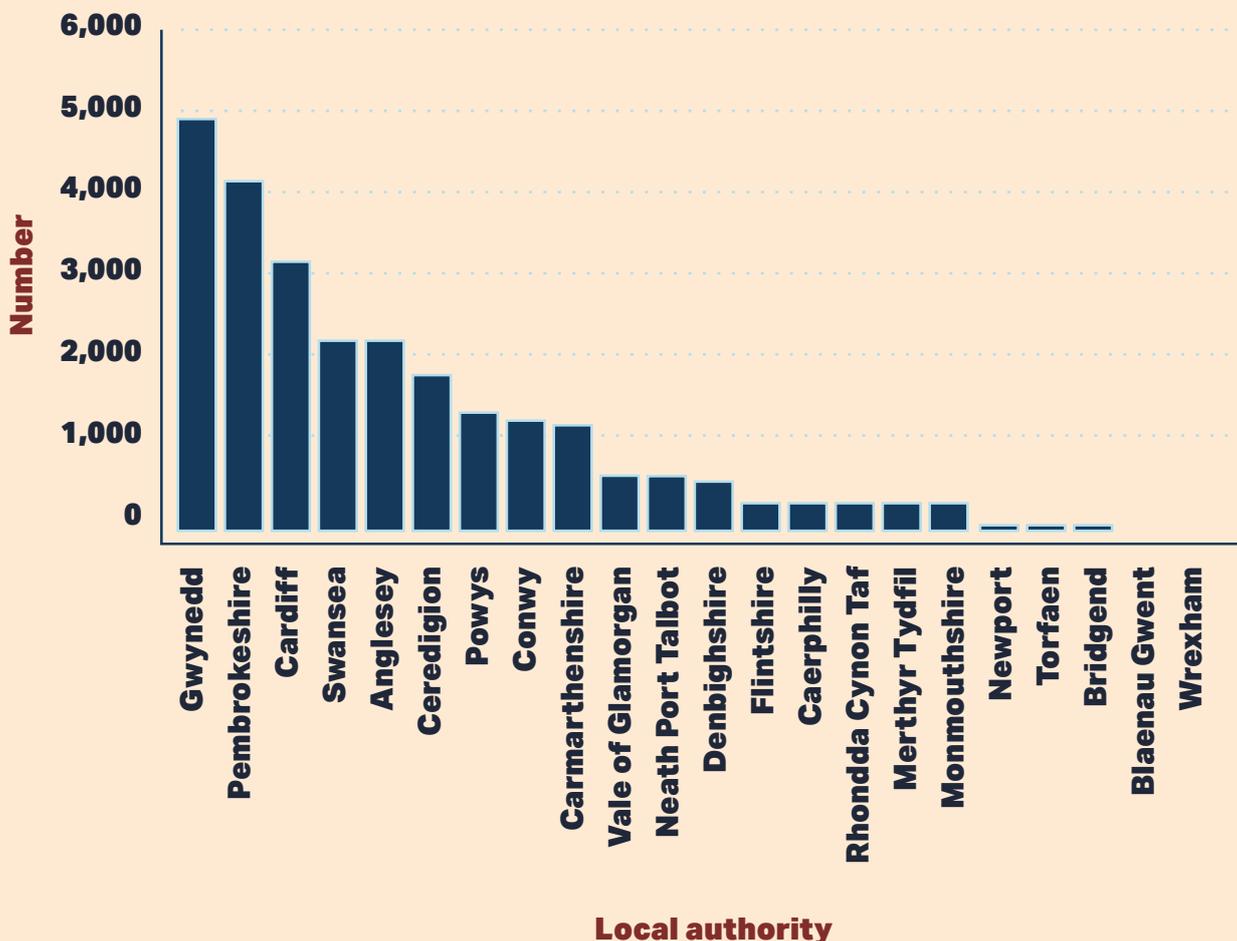
²⁰ Huw Lewis, [Looking beyond ARFOR: economic development strategies and the Welsh language](#) (2025).

their communities. According to the Local Government and Housing Committee, Wales as a whole is facing a housing crisis, with a significant shortfall in the supply of social housing.²¹ The sharp rise in construction costs has slowed the construction of affordable housing, compounding the challenges already faced by communities with a high density of Welsh speakers.

In response to the crisis, Coleg Cymraeg Cenedlaethol awarded a grant to Academi Hywel Teifi to scrutinise public policy on second homes in Wales and Cornwall, and Dr Simon Brooks was commissioned to lead the work. **Second Homes: Developing new policies in Wales** was published in March 2021.²² The main conclusion of the report was that second homes pose a serious challenge in some parts of Wales **undermining both the community and linguistic sustainability of these communities.** According to the report, the economic and social changes brought about by Brexit and COVID-19 have intensified the problem, creating a need for urgent policy interventions.

Using Welsh Government data on the number of second homes on which the council tax premium could be charged as second homes during 2020–21, the report makes it very clear that second homes are a regional problem in Wales.

Chart 25: The number of second homes on which it was estimated that the council tax premium could be charged as second homes during 2020–21 by local authority²³



(Source: Welsh Government, 2020)

²¹ Local Government and Housing Committee, **Social housing supply** (November 2024).

²² Simon Brooks, **Second Homes: Developing new policies in Wales** (March 2021).

²³ Welsh Government, **Council Tax Dwellings in Wales, 2020-21** (January 2020).

Following the publication of the report, the Welsh Government published **the Welsh Language Communities Housing Plan**.²⁵ The plan introduced measures to limit the negative impact of second homes by offering support for community-led housing projects. The plan also **introduced amendments to The Council Tax** (Long-term Empty Dwellings and Dwellings Occupied Periodically) (Wales) Regulations 2022. These reforms enable local authorities to charge a council tax premium of up to 300% on second homes and short-term holiday accommodation. The purpose of the premium is to encourage owners of second homes or long-term empty properties to put the property on the market for sale or letting, thereby increasing the supply of affordable housing for local people. The policy therefore **sought to address the negative impact of too many second homes, such as reducing the number of permanent residents, school closures, and the impact of this on the sustainability of Welsh-speaking communities.**

Gwynedd Council was the first local authority to take advantage of the new regulations when the premium was increased to 150% in April 2023. It was reported in September 2024 that the number of chargeable second homes in Gwynedd fell by 5% between April 2023 and April 2025. There are now 21 local authorities charging a council tax premium on second homes and empty homes.

To complement the above policy, the Welsh Government **introduced amendments to planning legislation in 2022** to enable Local Planning Authorities to introduce **Article 4 Directions** to control the use of houses as second homes and holiday accommodation. Planning authorities now have the right to require owners to apply for planning permission before changing the use of a residential property to a second home, short-term holiday let, or specific mixed-use. To date Snowdonia National Park Authority and Gwynedd Council have introduced an Article 4 Direction to control the use of houses as second homes and holiday lets within their boundaries.²⁶

To monitor the impact of the above policies and to pilot further policy interventions, **the Welsh Government launched the Dwyfor Pilot scheme in June 2022**. The Government is working with Gwynedd Council and the housing associations operating in the pilot area. As well as monitoring the impact of the Article 4 planning direction and higher taxes on second homes and empty properties, the pilot is also implementing the Home Purchase project, which offers financial support to local buyers with a connection to the area.

Establishment of the Commission for Welsh-speaking Communities

One of the most significant developments in Welsh language policy over the past five years was the Welsh Government's decision to establish a **Commission for Welsh-speaking Communities in August 2022**. Although the concept of identifying areas of linguistic significance is not new, this is the first time that the Welsh Government has formally **recognised the need to consider developing policy interventions specific to areas with a higher density of speakers**. The Commission was established with a remit to examine the factors influencing the vitality of the Welsh language in communities and make policy recommendations to support the Welsh language in these areas.

²⁵ [The Welsh Language Communities Housing Plan \[HTML\] | GOV.WALES.](#)

²⁶ In November 2025 the High Court ruled that the Gwynedd Local Planning Authority must revoke the Article 4 Direction. Gwynedd Council have declared their intention to appeal to the Court of Appeal.

In August 2024 the Commission published its final report, *Empowering communities, strengthening the Welsh language*.²⁷ The report includes a detailed analysis of the 2021 Census results, which clearly show the decline in the stability of the Welsh language in the areas with the highest density of Welsh speakers. **The Commission is of the view that there is a significant threat to the vitality of the Welsh language, not only in those areas, but also at a national level.**

The Commission's main recommendation is that the Welsh Government needs to legislate to give official status to areas of Wales with a high density of Welsh speakers. According to the Commission, **the establishment of areas of higher density linguistic significance** would enable the development of public policies tailored to the specific needs of these areas.

The report outlines how public policy could be adapted to order to support Welsh as a community language in these areas. The Commission proposes a wide range of policy recommendations across key areas including education, planning and housing, economic development, and community language planning. The Commission recognises that further work is needed on the development of concrete policy proposals in these areas, but that the key first step is to establish the areas of higher density linguistic significance. This would create the framework for the development and implementation of significant policies in key areas such as housing, planning and the economy.

The Welsh Government has, in principle, accepted the majority of the recommendations in the report, including the main recommendation of designating areas of higher density linguistic significance. Although the Government has established a forum for considering how these recommendations could be implemented, **it does not appear that any firm decisions will be made before the end of the Sixth Senedd term.**

The Commission has **emphasised that establishing areas of higher-density linguistic significance would not diminish the status of the Welsh language in other parts of Wales.** Rather, it reflects the need to develop and implement policies tailored to diverse linguistic contexts. In this context the Commission has now progressed to phase 2 of the Commission, which will consider policy interventions needed in areas with a lower density of Welsh speakers.

²⁷ Commission for Welsh-speaking communities, *Empowering communities, strengthening the Welsh language* (August 2024).

3.2 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

The analysis of the results of the 2021 Census clearly shows that the **Welsh language is losing ground in the very areas where it has traditionally been at its strongest.** Gwynedd, Anglesey, Ceredigion and Carmarthenshire have the highest density of Welsh speakers, yet the evidence highlights that the position of the Welsh language is declining in these areas. The scale and speed of the decline in the number and percentage of Welsh speakers in Carmarthenshire in particular is a cause for serious concern, and **highlights the need for urgent action to support the Welsh language in its strongholds.**

Evidence on the social use of the Welsh language also highlights the significance of these areas, both in terms of everyday language use and in the transmission of Welsh between generations. If **Welsh is to remain a living language used naturally** by the majority of the population, it is essential to halt, and reverse, decline in those areas where the density of speakers remains relatively high.

Despite the concern raised by statistical trends, **some significant developments over the reporting period have set a much clearer direction for future public policy development.** Chief among these is the establishment of the Commission for Welsh-speaking Communities. The establishment of the Commission marks a significant policy shift on the part of the Welsh Government, and **for the first time there is acknowledgement of the need to focus specifically on supporting areas where there is a high density of speakers,** and where the Welsh language continues to be used and transmitted naturally between generations.

Priority



The further decline of the Welsh language in the areas where it is currently at its strongest must be prevented if we are to strengthen its position across the whole of Wales. The Welsh Government must urgently publish a white paper to implement the Commission for Welsh-speaking Communities' key recommendation to establish areas of higher density linguistic significance.

The establishment of areas of higher-density linguistic significance is not, in itself, a definitive solution to the various challenges that exist, but **the implementation of this key recommendation would be a significant step in the right direction.** Designating these areas would create a robust framework and mechanism for the development, delivery, and evaluation of policy interventions in key areas such as housing, planning, the economy, and community language planning. Together with reforming the promotion standards regime and local promotion strategies (see priority 6), this is the **vehicle and first step for the development and delivery of vital policy interventions that will be needed to protect and strengthen the position of the Welsh language in these areas and beyond.**

4. Services, workplaces and increasing opportunities to use the Welsh language

One of the main challenges for the Welsh language today is ensuring that people can use the language beyond the home or classroom. Although an increasing number can speak Welsh, their ability to use it depends on providing practical situations where the language can be used naturally. *Cymraeg 2050* acknowledges the central role of the Welsh Language Commissioner and the impact of the Welsh Language Measure in driving change within workplaces and services: two key areas that provide vital opportunities to use Welsh. Without such opportunities, skills weaken and confidence wanes.

Increasing opportunities to use Welsh – not only through expanding services, but also through creating Welsh language workplaces and developing an increasingly bilingual workforce – is absolutely crucial to meeting this challenge and ensuring that Welsh is a living, functioning language in the Welsh economy and public services. A key part of this work is the joint planning and collaboration that takes place between the Commissioner and other strategic partners such as the National Centre for Learning Welsh and the Coleg Cymraeg Cenedlaethol.

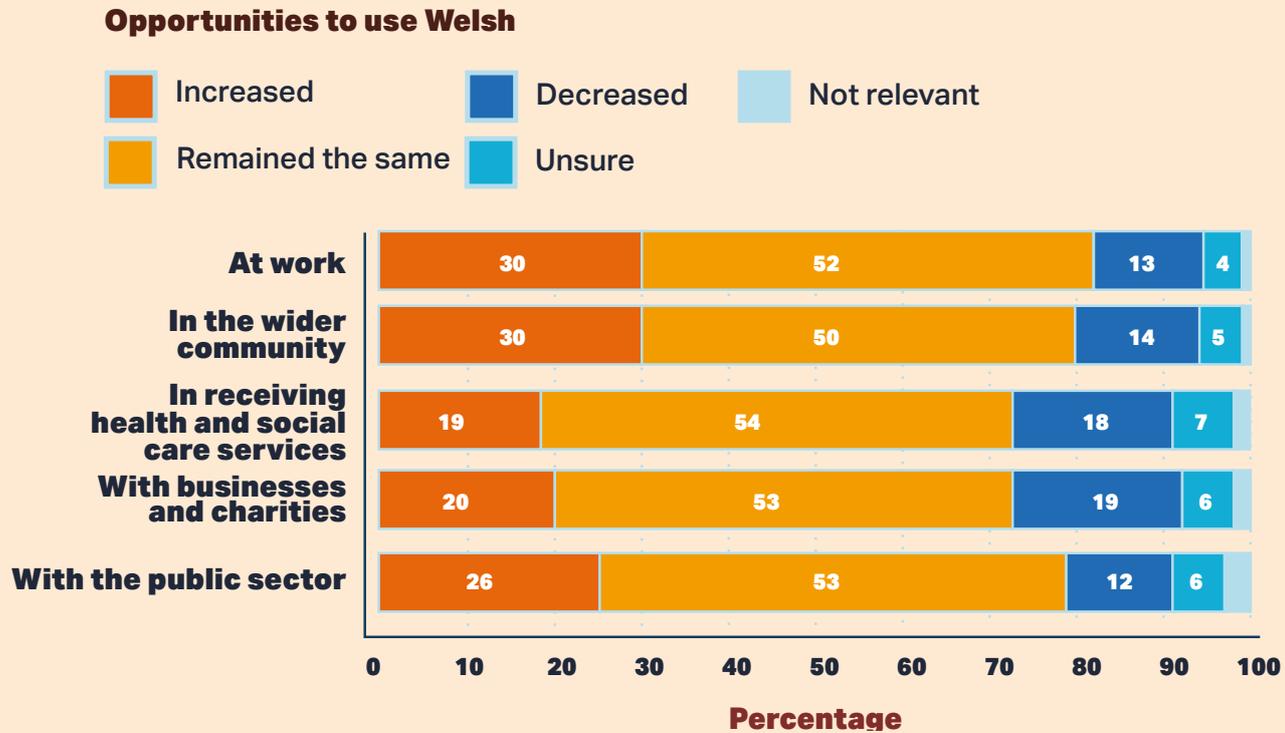
4.1 The evidence

Use of the Welsh language when receiving services

The Commissioner conducts an annual survey of Welsh speakers' views on the Welsh language services of public organisations and on opportunities to use Welsh. The most recent survey carried out at the end of 2025 included a sample of 737 Welsh speakers from across Wales.

Depending on the context, between 19% and 30% of Welsh speakers believe that opportunities to use Welsh have increased over the past year.

Chart 26: Welsh speakers’ views on whether the opportunities to use Welsh in the following situations have increased, decreased, or remained the same over the past year

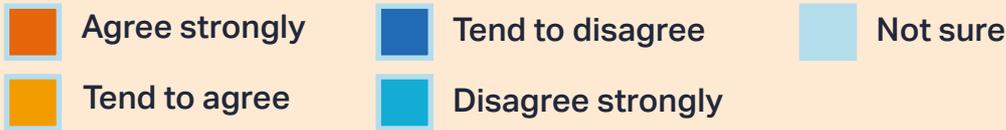


(Source: Welsh Language Commissioner's Opportunities to Use Welsh Survey, 2025)

A higher proportion of Welsh speakers believe **that opportunities to use Welsh have increased at work and in the wider community** compared to opportunities with receiving health and care services or with businesses and charities.

As illustrated in Chart 27, while **93% of respondents believed that it was important to receive a service in Welsh when dealing with public bodies**, a smaller percentage (75%) were confident that they could receive a service in Welsh. **In the case of medical appointments, 88% of the sample believed that it was important to be able to receive a service in Welsh**, and 56% were confident that they could receive a service in Welsh if they wished. **89% of the sample believed that it was important to receive a service in Welsh when dealing with businesses and charities**, and 55% were confident that they could receive a service in Welsh.

Chart 27: The extent to which Welsh speakers agree or disagree with the following statements



Businesses and charities

I'm confident that I can receive services in Welsh

I believe that it's important to receive services in Welsh

Health and social care services

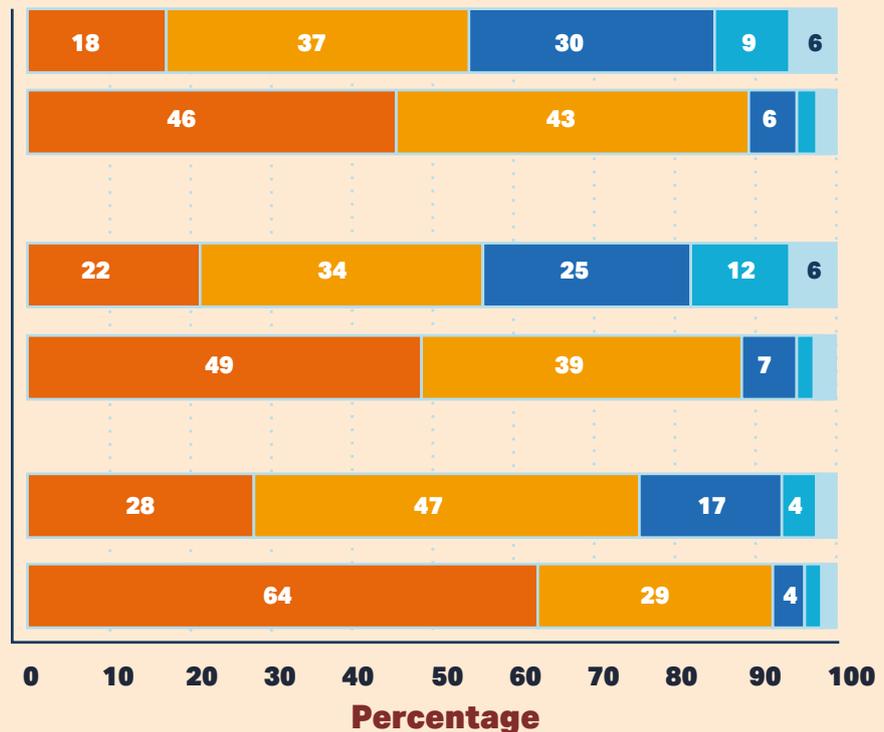
I'm confident that I can receive services in Welsh

I believe that it's important to receive services in Welsh

Public sector

I'm confident that I can receive services in Welsh

I believe that it's important to receive services in Welsh



(Source: Welsh Language Commissioner's Opportunities to Use Welsh Survey, 2025)

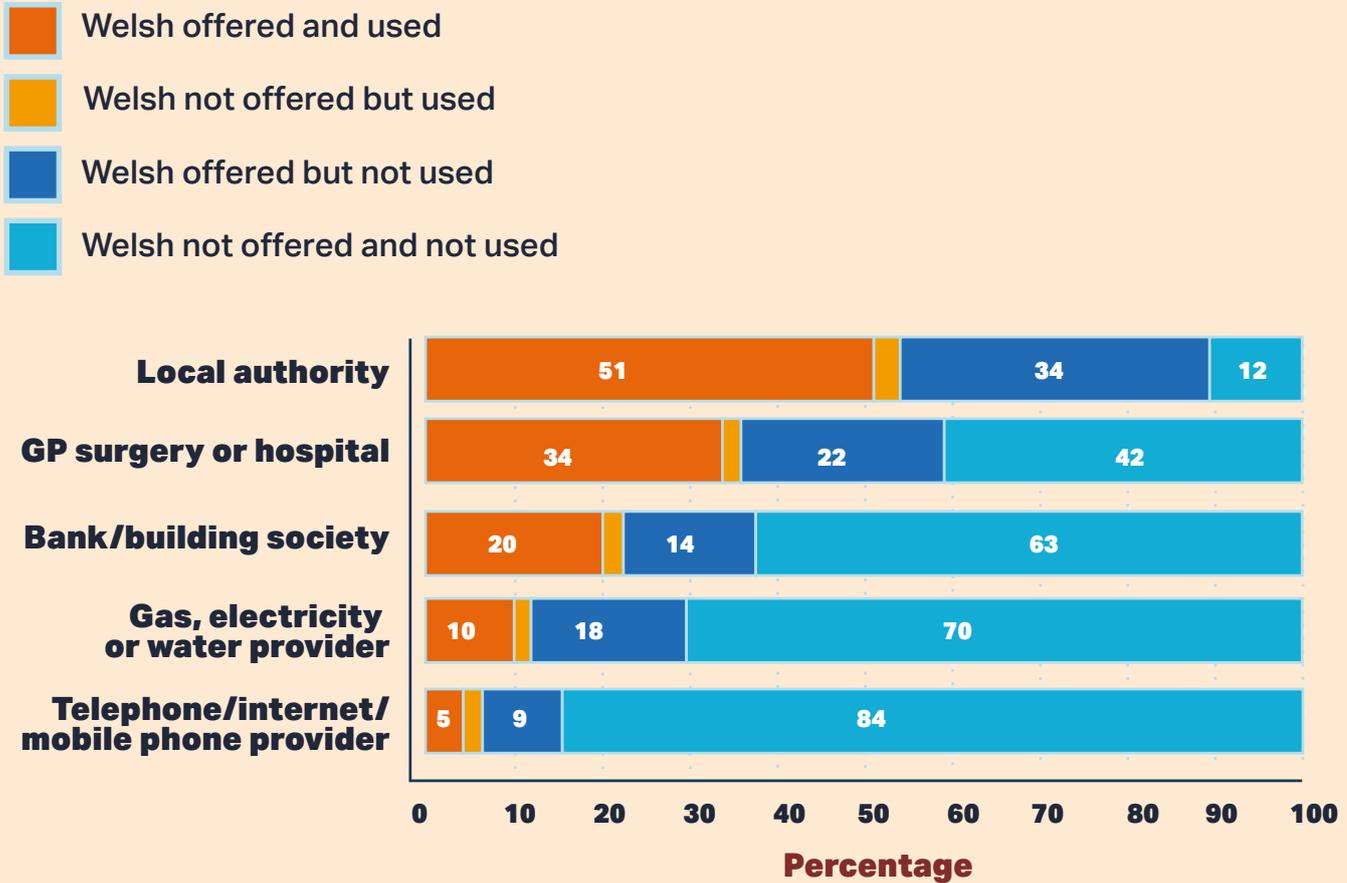
The 2019–20 Language Use Survey also provides some information on the extent to which Welsh speakers are offered services in Welsh, and the extent to which they use these services.

As shown in Chart 28, **Welsh speakers are far more likely to report having been offered and receiving a Welsh language service the last time they contacted the local authority compared to all other types of service providers.** 85% of Welsh speakers said they had been offered a Welsh language service the last time they contacted the local authority, and 53% of them had used Welsh.

For GP surgeries or hospitals, 56% indicated that they had been offered a service in Welsh, and 36% said they had used Welsh. Welsh speakers were much less likely to say that they had been offered a service in Welsh by gas, electricity or water providers (28%) or by telephone or internet companies (14%).

Fluent Welsh speakers, those who used the language daily and those who had learnt the language at home as young children were more likely to choose and use Welsh for all types of services.

Chart 28: The percentage of Welsh speakers reporting that Welsh language services were offered and used when dealing with service providers²⁸



(Source: Welsh Language Use Survey 2019–20)

The Commissioner’s survey also asks which language Welsh speakers have used most often in different situations over the past year. Although the questions differ between the Language Use Survey and the Commissioner’s survey, the percentage stating that they use the Welsh language with the public sector is relatively consistent. The Commissioner’s survey shows that 44% of Welsh speakers use Welsh always, mainly, or as equally as English when dealing with the public sector. The Language Use Survey also reports that around half of Welsh speakers use Welsh when dealing with local authorities.

As well as asking what language they used most often in different situations, the Commissioner’s survey asks what language they would prefer to use in these situations. As shown in Chart 29, **the percentages stating that they would prefer to use Welsh always or mainly are consistently higher than the percentages stating that they currently use Welsh in these situations.** It is interesting to note that almost three times as many Welsh speakers would prefer to use Welsh always or mainly when accessing health and care services (28%), compared to the percentage who currently use Welsh (10%). The same is true in relation to businesses and charities.

²⁸ These statistics do not include Welsh speakers who had indicated that they had not been in contact with the service providers in the previous 12 months.

Chart 29: Which language Welsh speakers have used most often in the following situations, and which language they would prefer to use in the following situations

Language

- Always/mostly Welsh
- English and Welsh roughly equally
- Always/mostly English
- Other language
- Not relevant

At work

Language currently used

Preferred language

In the wider community

Language currently used

Preferred language

Public sector

Language currently used

Preferred language

Health and social care services

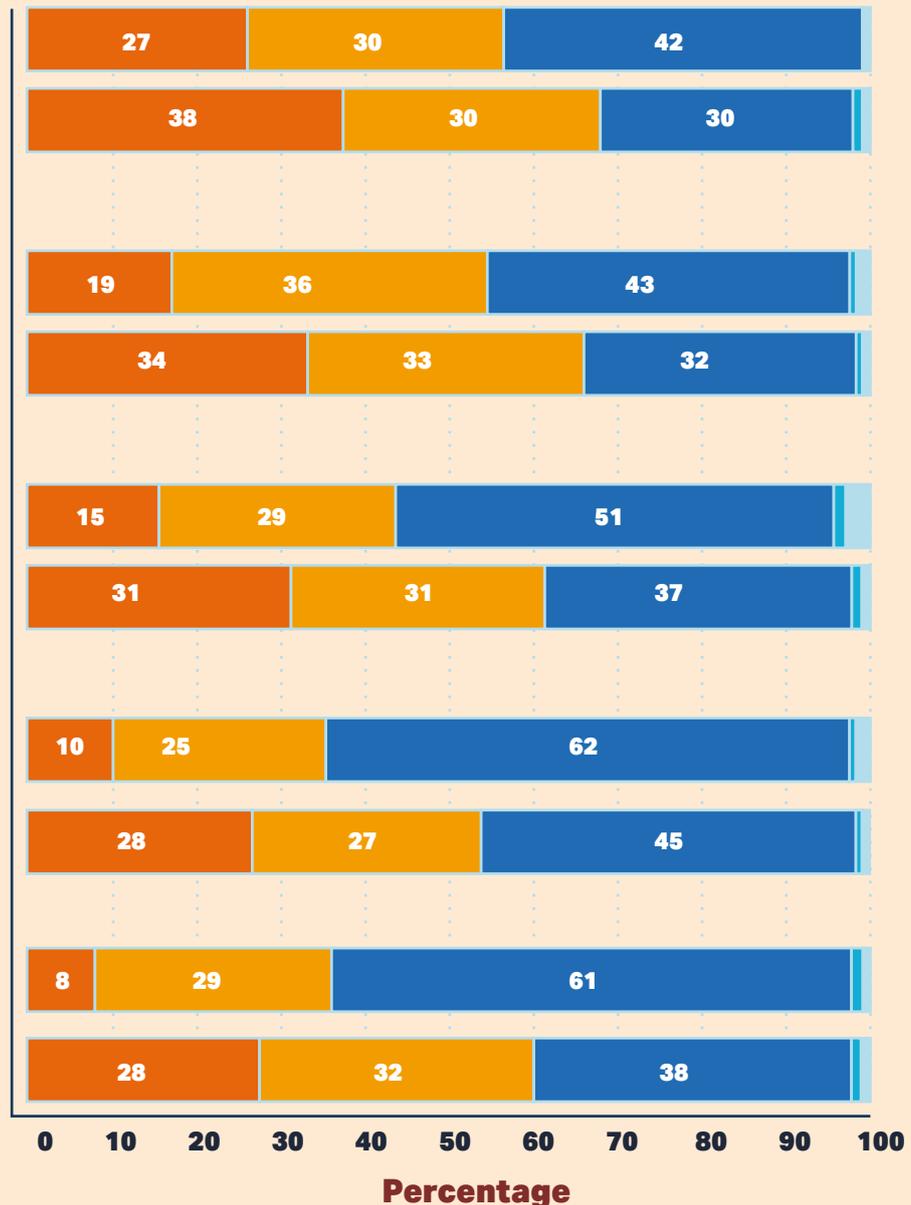
Language currently used

Preferred language

Businesses and charities

Language currently used

Preferred language

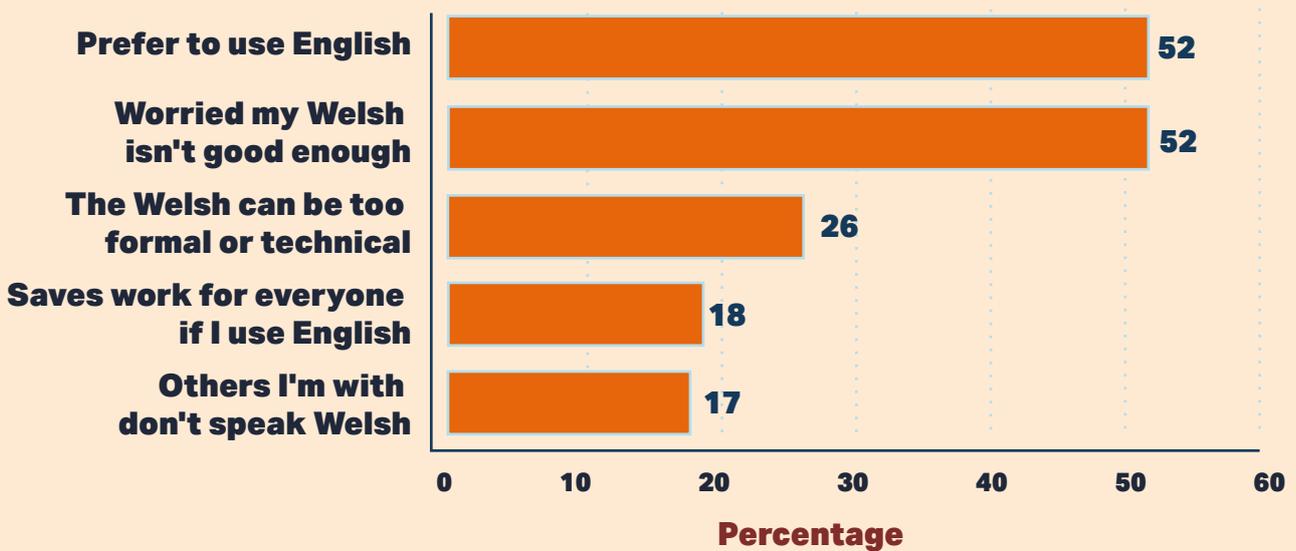


(Source: Welsh Language Commissioner's Opportunities to Use Welsh Survey, 2025)

These results are consistent with the results of another research survey carried out by the Commissioner regarding the use of Welsh by children and young people.²⁹ The results of that survey also showed that the percentage of children and young people who stated that they would *like* to use Welsh in different contexts was significantly higher than the percentage who indicated that they were currently using Welsh when using various services.

According to the Language Use Survey, the main reasons Welsh speakers give for choosing to use English when receiving services is that they prefer to use English, or that they are worried that their Welsh is not good enough.

Chart 30: The main reasons for using English given by Welsh speakers who had said that they used English mainly, almost always, or always

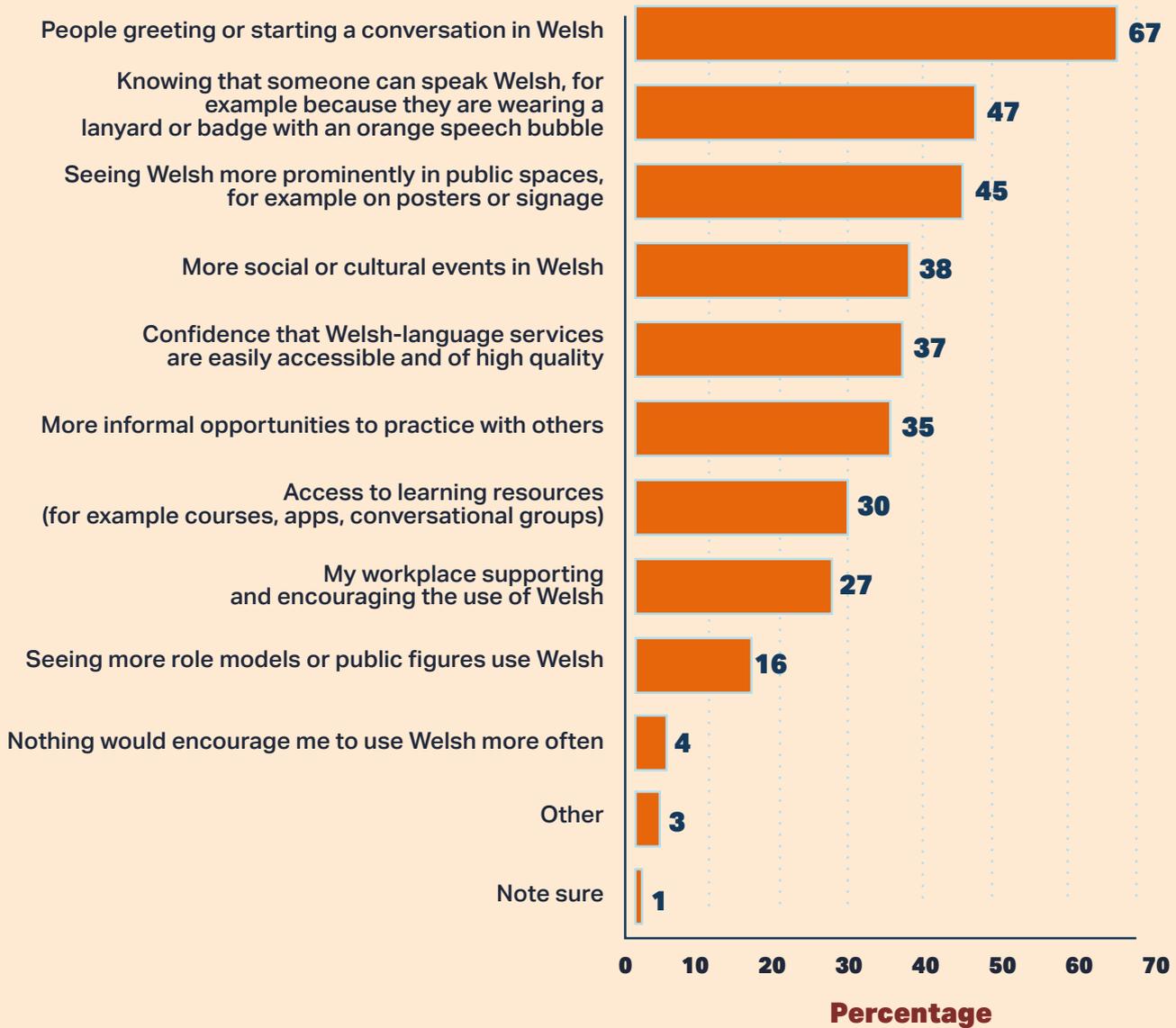


(Source: Welsh Language Use Survey 2019–20)

The Commissioner turned this question on its head somewhat and asked Welsh speakers what would encourage them to use Welsh more often.

²⁹ Welsh Language Commissioner, *The use of Welsh among children and young people* (May 2025).

Chart 31: What would encourage Welsh speakers to use Welsh more often?



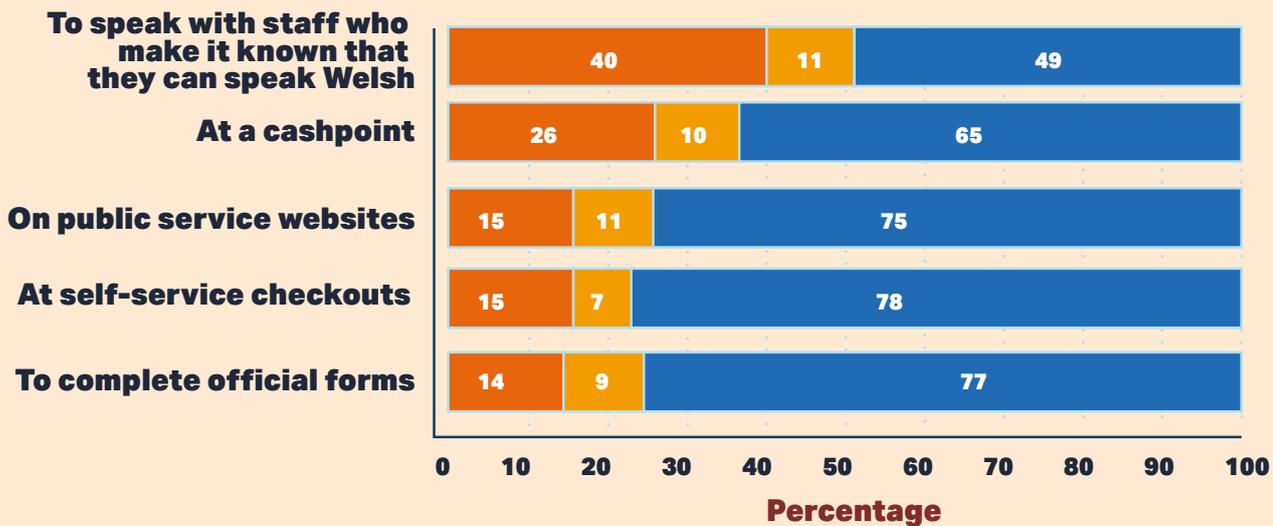
(Source: Welsh Language Commissioner's Opportunities to Use Welsh Survey, 2025)

It is clear from these results that the **main thing that would encourage Welsh speakers to use Welsh would be if other people started a conversation in Welsh**, or if they already knew that someone could speak Welsh. The Language Use Survey also shows that Welsh speakers are more likely to use Welsh in situations where staff make it clear that they can speak Welsh.

Chart 32: Language usually chosen by Welsh speakers according to the type of service³⁰

Language

- Always/almost always in Welsh/mainly Welsh
- Roughly equal use of Welsh and English
- Always/almost always in English/mainly English



(Source: Welsh Language Use Survey 2019–20)

It is **striking that the Welsh language services used most often are those where a member of staff makes it clear that they are able to speak Welsh**, and it could be assumed that these would be face-to-face or telephone services. It is also interesting that cashpoint services are next, with over a quarter of Welsh speakers choosing to use this common, long-established service.

³⁰ This data does not include those who indicated that they had not used the service. For this analysis the categories always/almost always in Welsh and Welsh mainly have been combined. The categories always/almost always English and mainly English are also combined.

The Commissioner's survey also clearly demonstrates the importance of the active offer of Welsh language services, and that the use of Welsh is unhindered.



82% of Welsh speakers report that they are more likely to use Welsh language services if they are easily and freely available.

81% note that they are more likely to use Welsh language services if organisations make it clear that they are available.

One obvious way of signalling the ability to speak Welsh is to wear an orange laith Gwaith badge. With the logo celebrating its 20th anniversary in 2025, it has become firmly established. The Commissioner's survey data supports this with 75% of Welsh speakers saying that they are aware of the logo and its meaning. 77% of respondents also said that seeing this logo would make them more likely to use Welsh.



75% of respondents say they are aware of the logo and its meaning.

77% of respondents stated that seeing this logo would make them more likely to use Welsh.

65% have started a conversation in Welsh in the last year after seeing the logo.

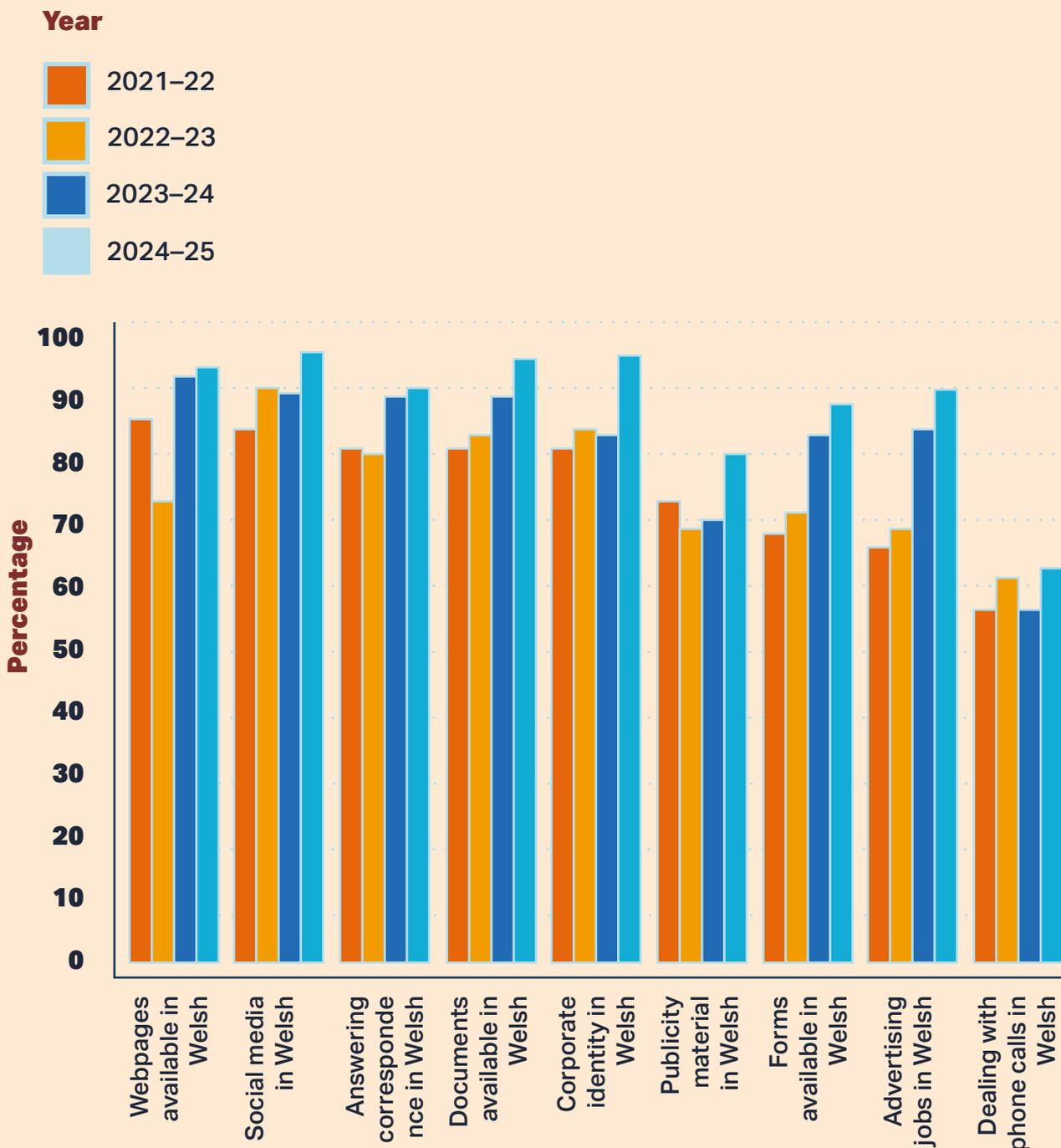
Availability of Welsh language services

Assuming that **82% of Welsh speakers indicate that they would be more likely to use Welsh language services if they are easily and freely available**, it is fair to examine the data we have on the availability of Welsh language services during the reporting period. The Commissioner systematically and consistently verifies the Welsh language services of organisations, gathering evidence on user experiences and how organisations are performing in relation to their statutory duties. This gives us a first-hand insight into the experiences of Welsh speakers and an overview of the assurance that service users can receive a Welsh language service. These findings are published in a variety of regular performance reports.³¹

³¹ Performance reports (Accessed January 2026).

During this reporting period, the Commissioner has calculated the ability of organisations to comply with the standards by conducting surveys focused on nine key service areas. The results in Chart 33 show that compliance levels are consistently high across those services where there is a strong element of central control within organisations, including areas such as corporate identity and websites.

Chart 33: The percentage of organisations surveyed that complied with the requirements of the relevant standards (2021–25)



(Source: Data from the monitoring activities of the Welsh Language Commissioner)

Chart 33 shows the highest levels of compliance in 2024–25 in each of the areas covered. This is in line with the findings of our most recent report on the performance of organisations, ***Empowering the Welsh language through strong governance***.³² That report emphasised that a significant number of organisations have been implementing the standards for several years now, and that the steady increase in compliance levels over recent years **suggests that awareness of the requirements has become embedded and integral to the organisations' activities**.

It is worth noting, however, the relatively slow progress in the percentage of organisations across sectors to deal with calls and provide a full response in Welsh during the reporting period. Chart 34 highlights that it rose from 56% in 2021–22 to 61% in 2022–23, before falling again in 2023–4, reaching 63% in 2024–25. This suggests that there is some progress, but that progress is too slow and inconsistent given the length of period in question.

Chart 34: The percentage of organisations surveyed dealing with telephone calls in Welsh (2021–25)

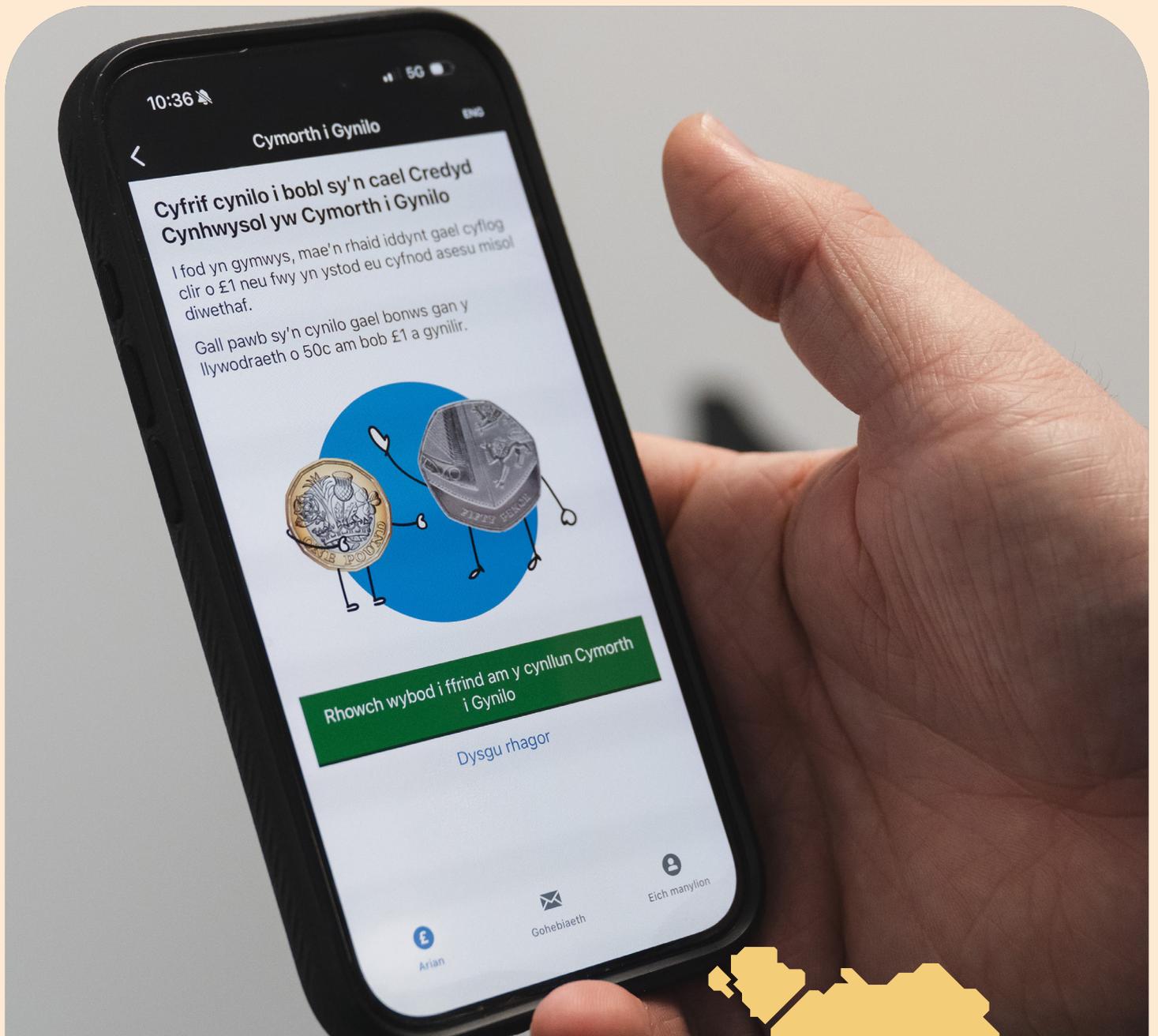


(Source: Data from the monitoring activities of the Welsh Language Commissioner)

³² Welsh Language Commissioner, *Empowering the Welsh language through strong governance* (July 2025).

Key conclusions

- The evidence shows that the extent to which **Welsh language services are offered varies significantly depending on the type of service**. While a high proportion of Welsh speakers are offered Welsh language services by local authorities, for example, far fewer are offered a service in Welsh from other sectors such as telephone and internet companies.
- The percentage of Welsh speakers who **state that they wish to use Welsh in different contexts is significantly higher than the percentage of those who indicate that they use Welsh** when receiving different services.
- Although a significant proportion of Welsh speakers choose to use Welsh when receiving services, there is also a **significant proportion who choose not to use Welsh**.
- The **main reasons given for not using Welsh** were that they **preferred to use English**, or that **they lacked confidence in their Welsh language skills**.
- There is clear evidence **that individuals would be more likely to use Welsh if an active offer of those services was made**, such as being greeted in Welsh or seeing the Iaith Gwaith logo signalling that a service is available in Welsh, making using Welsh **an easy and convenient choice**.
- The data arising from the Commissioner's work shows **steady improvement in the performance of organisations but that there is more work to be done**. This is particularly true in relation to the provision of telephone services in Welsh, which is important given that **speaking Welsh with a member of staff is the Welsh language service that Welsh speakers are most likely to use**.



A language
for public services



Following the development and implementation of its language scheme, His Majesty's Revenue and Customs (HMRC) ensures that all customers, wherever they live, can access high-quality Welsh language services. This reflects HMRC's commitment to accessibility and inclusion, and its aim to ensure the organisation is open to all.

As HMRC transitions to a modern digital service, quick and simple access for customers is essential. The HMRC app enables users to manage their money and tax in one place, significantly reducing the need for contact by phone or post.

Lee Jones, Head of Welsh language services at HMRC, is passionate about ensuring equal opportunities to Welsh and non-Welsh speakers alike.



As digital options become more popular, HMRC have transformed our most-in demand services like finding your National Insurance Number, claiming a tax refund, checking your tax code and claiming Child Benefit, to enable customers to self-serve. An integral part of this was the development of all our online services in Welsh.

The app enables users to manage their tax issues in one place bilingually – making it the quickest and easiest way to deal with many simple actions and questions.

According to Lee, this app is also breaking new ground.



By learning from our Welsh user research and our bilingual service design principles, this app is the first of its kind across UK Government to offer the option to switch between Welsh and English seamlessly – without users needing to change their phone's settings.

This innovative feature has proven extremely popular with customers, as many are keen to be able to switch between the two languages while working in the app.

It is clear the app has been a success as over 36,500 users have already chosen the Welsh option. This reduces the demand on the customer service team that would normally deal with basic enquiries, freeing staff to focus on more complex queries.

But Lee is also keen to ensure that staff internally are aware of the importance of bilingual services.



All campaigns, such as the one that has developed and promoted the app, include internal communication to staff, with the aim that they are fully aware of the rationale for delivering a bilingual service.

It's great to be able to develop the technology but it's vital to go the extra mile and promote it effectively to our users – and that work is continuous.





30% of respondents report that opportunities to use Welsh at work have increased over the past year.

27% indicate that they have always or mainly used Welsh at work over the past year, and a further **30%** indicate that they use Welsh and English fairly equally.



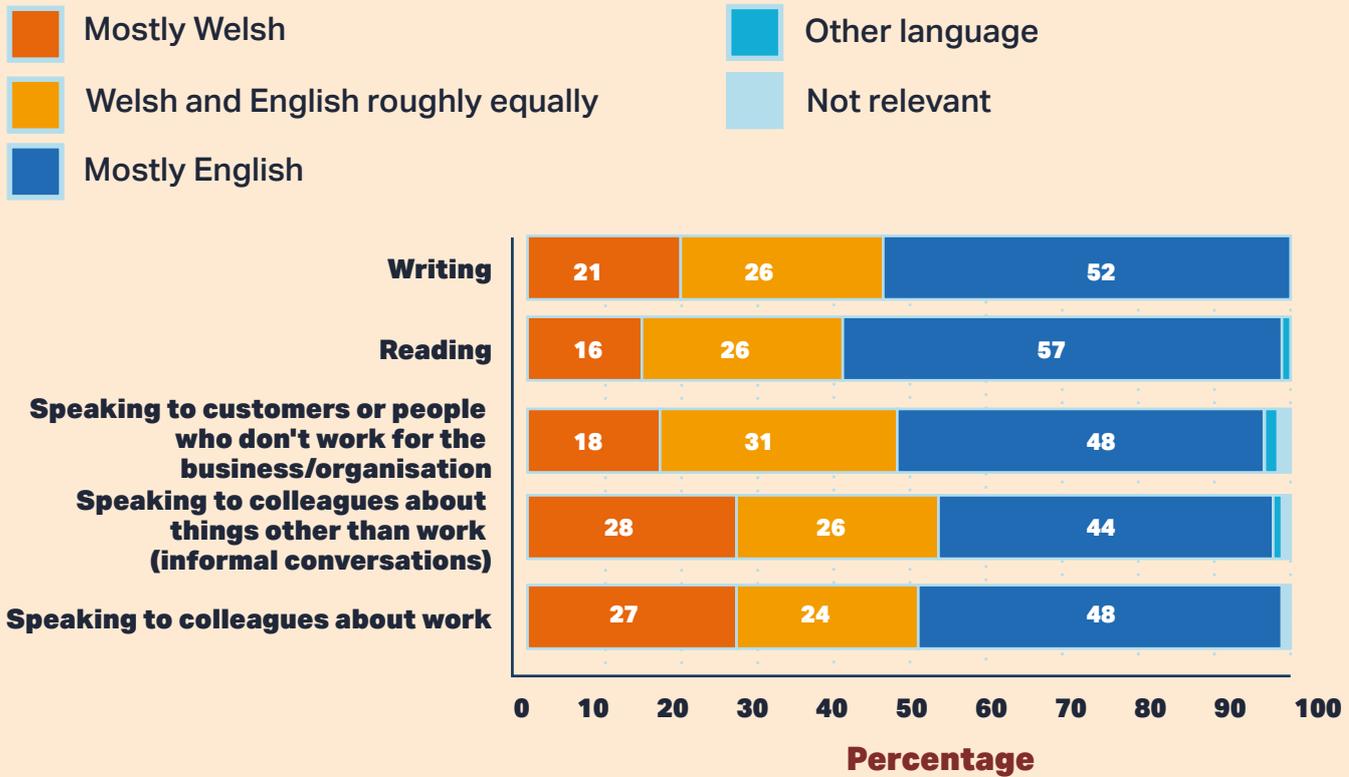
38% stated that they would like to use Welsh always or mainly at work, and an additional **30%** stated that they would like to use Welsh and English equally.

Using Welsh at work

It has already been noted that 30% of people who responded to the Commissioner's survey feel that opportunities to use Welsh at work have increased over the past year. Along with the community, this is the area that saw the most progress. Chart 29 has shown us that 27% of Welsh speakers surveyed as part of the Commissioner's survey have always or mainly used Welsh at work and a further 30% have used Welsh and English fairly equally. The Commissioner's survey also asked what language respondents would like to use at work, and **38% said they would like to use Welsh always or mainly at work.**

The results of the Commissioner's survey also give us a more detailed insight into *how* Welsh speakers use Welsh at work, in other words, what language skills they use and with whom. For example, **it is interesting to note that Welsh speakers mostly use spoken Welsh,** and specifically when talking to colleagues (whether this is discussing work or in more informal conversations).

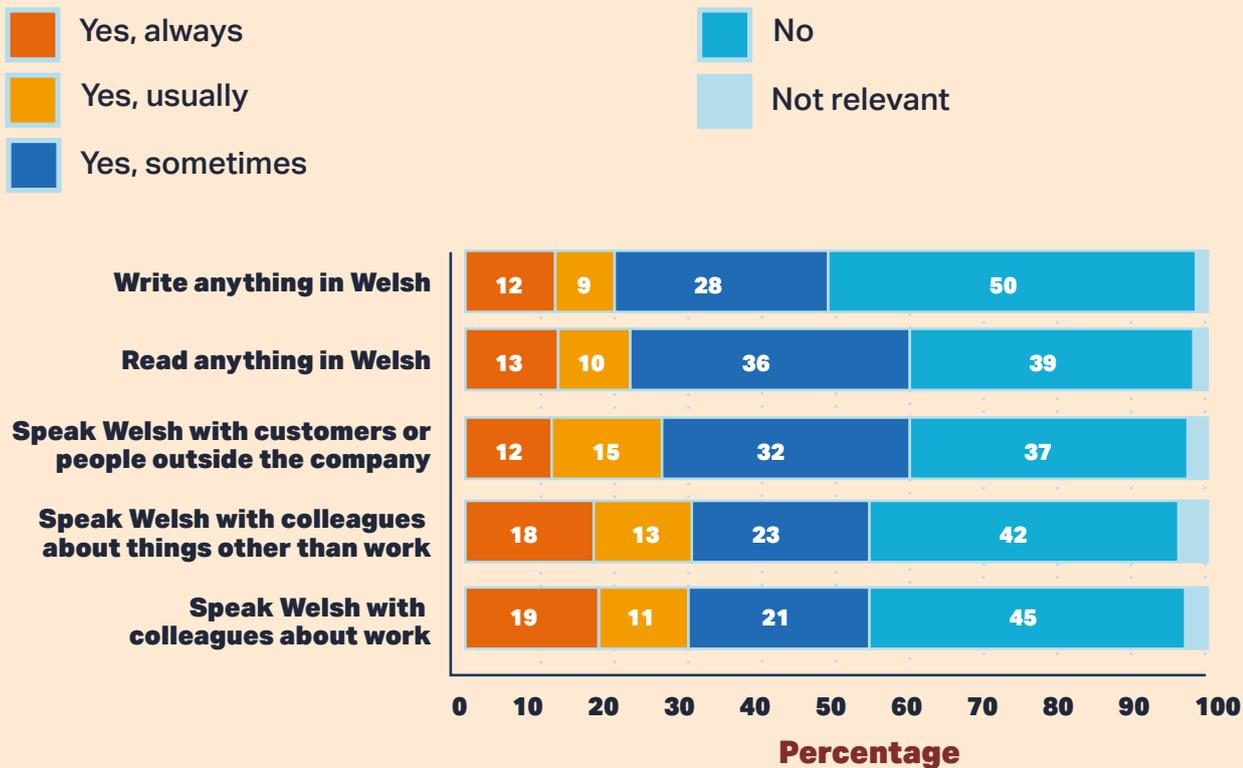
Chart 35: What language do Welsh speakers mainly use to do the following?



(Source: Welsh Language Commissioner's Opportunities to Use Welsh Survey, 2025)

Although it is not possible to compare directly with the Language Use Survey due to the variety of possible responses, these results are relatively consistent with the results of the Language Use Survey conducted in 2019–20. 30% of Welsh speakers at the time reported that they used Welsh always or usually at work to discuss work with colleagues. And 54% used Welsh to chat about things that weren't work-related, at least sometimes.

Chart 36: Percentage of Welsh speakers who speak Welsh at work



(Source: Welsh Language Use Survey 2019–20)

A further analysis of the results of the Language Use Survey and attitudes towards the language can be read in the statistical bulletin which is dedicated to discussing **Welsh language use in the workplace**.³³ It also reports on people's views on the availability of technologies and training opportunities to support the use of Welsh at work.

It must be emphasised that the results of the Language Use Survey do not reflect the changes that have taken place in working arrangements since the pandemic in some sectors, with many adopting hybrid working arrangements with extensive use of virtual meetings. **It will therefore be necessary to establish a new national data baseline to determine what impact new ways of working – and new technologies – have on the frequency of use in the workplace, as well as the confidence of speakers to use their full range of language skills.**

Key conclusions

- The evidence suggests that **opportunities to use Welsh in the workplace are increasing.**
- The evidence also suggests that **Welsh speakers would like more opportunities to use Welsh at work** with 38% stating that they would like to use Welsh *always* or *usually* in the workplace and a further 30% would like to use Welsh and English equally, i.e. to work fully bilingually.

4.2 Main developments

The statistical evidence above provides important information about the experiences and aspirations of Welsh speakers to use the language in terms of receiving services and at work, while also highlighting the practical and psychological challenges that influence their language choices. This information underpins the Commissioner's work in promoting and facilitating the use of the Welsh language.

The Welsh Language Commissioner's regulatory work

The purpose of the Commissioner's regulatory work is to increase the opportunities for people to use the Welsh language when receiving services. The work goes far beyond statutory investigations and the imposition of enforcement action; It includes setting duties, monitoring compliance, investigating complaints, promoting good practice, and providing guidance and support. **Together, these activities ensure high-quality services and increase opportunities to use the Welsh language**

A detailed report of how organisations were performing was provided in Part 3 of the previous 5-year report.³⁴ It was concluded at the time that the **introduction of the standards had significantly improved the experiences of Welsh speakers but that there was still room**

³³ [Welsh language use in the workplace \(Welsh Language Use Survey\): July 2019 to March 2020 \[HTML\] | GOV.WALES.](#)

³⁴ [The Position of the Welsh Language 2016–20: Welsh Language Commissioner's 5-year Report.](#)

for improvement in the consistency of the performance of some organisations. In reviewing the performance of organisations in 2019–20, the Commissioner warned that some were failing to meet the standard and as a result, there was a risk that a gap would develop between those organisations that were compliant and continuously improving, and those that had not yet put adequate arrangements in place.

There were significant differences between sectors, with the strongest performance seen by organisations on which the standards were imposed first, including Local Authorities, Welsh Government and National Parks, while the performance of organisations in the health and education sectors was weaker and more inconsistent. The results of our surveys have shown that the services of non-devolved organisations, that continue to implement language schemes, are not available in Welsh to the same extent as the services of organisations that implement standards.

The evidence shows that levels of compliance with Welsh language standards have continued to improve over the reporting period but progress in some areas is too slow or inconsistent, as noted in the report *Empowering the Welsh Language through strong governance*.³⁵ While public organisations are gradually incorporating Welsh language standards into their operations – particularly in areas such as corporate branding, websites, documents, social media and job advertisements – significant concerns remain about compliance in frontline services such as over the telephone and at receptions, as well as the way in which Welsh language services are promoted. Despite the positive progress over the reporting period, the evidence highlights that there are still **too many examples where Welsh speakers do not always receive services in Welsh and where a lack of an active offer** leads to undermining user confidence to use the language.

To address the challenge, **an approach to co-regulation was established** during the reporting period that places an emphasis on partnership working and self-regulation by organisations. The success of this approach depends on an open and honest environment that enables dialogue and collaboration. We are seeing early indications that this approach is starting to bear fruit, **shifting the emphasis from strict compliance to what really matters – positive outcomes for Welsh speakers**, especially when receiving services.

In line with the co-regulatory approach, a series of regulatory outcomes were published in 2024. The main intention of these outcomes is to **place the Welsh Language Standards and regulatory work in the context of the national vision of reaching one million Welsh speakers and doubling the daily use of the language**, and ensuring that our regulatory work has the greatest impact on opportunities to use Welsh. The aim is to try to ensure that the regulatory work focuses on real outcomes for Welsh speakers, and an attempt to avoid the risk of superficial compliance.

This desire to adopt a more proactive, strategic and dynamic regulatory approach is set out in the **Welsh Language Commissioner’s Strategic Plan for 2025–30**.³⁶ The strategic plan also outlines specific priorities and themes that will serve as a focus for the organisation over the next five years, including a special focus on workplaces, the health and care sector and children and young people, alongside the promotion standards, and the importance of community language planning.

³⁵ Welsh Language Commissioner, *Empowering the Welsh Language through strong governance*.

³⁶ Welsh Language Commissioner, *Welsh Language Commissioner’s Strategic Plan for 2025-30*.

Regulatory outcomes of the Welsh Language Commissioner



Outcome 1:

Organisations with the capacity to provide high-quality Welsh language services at all times.



Outcome 2:

Welsh language users understand and are aware of the Welsh language services available to them.



Outcome 3:

Organisations give due regard to the potential impacts of their policy decisions on the Welsh language.



Outcome 4:

Organisations increase the use of Welsh in their workplace, enabling staff to work in Welsh on a day-to-day basis.



Outcome 5:

Organisations promote the Welsh language so that people can use the language naturally in their daily lives.



Outcome 6:

Organisations protect and promote the interests of Welsh language users by having effective governance and complaints arrangements.

Workplaces and the Welsh Language

As already noted, the education system, and the tertiary education sector in particular, has a key role in ensuring that more individuals leave education and training with the confidence to be able to work through the medium of Welsh. As well as this focus on creating an increasingly bilingual workforce, there is also a **need to focus on the role of employers in planning for recruiting staff and utilising and developing their workforce's Welsh language skills** and in offering meaningful opportunities for individuals to use Welsh at work. This is also essential in order to be able to offer quality Welsh language services to users.

By virtue of our work with public organisations as a result of Welsh language standards and language scheme requirements, as well as our work with the private and third sectors, the Commissioner, in partnership with others, has a central role in increasing the use of Welsh within workplaces. The **Welsh language standards regime offers a powerful framework to encourage organisations to move along a linguistic continuum.** As well as standards relating to key issues such as **assessing the language skills of the workforce, offering language training, and recruitment, there is a requirement for organisations to adopt a policy regarding the internal use of Welsh.** An important development in this context was a commitment in the Welsh Language and Education (Wales) Act 2005 to review the standards relating to the improvement or assessment of the Welsh language skills of the workforce, in relation to the proposed code on describing competency in the Welsh language. **This is an important development that can strengthen the Commissioner's work in this strategic area.**

Although the majority of organisations have adopted internal policies on the use of Welsh, in line with the requirements of the standards, evidence shows that **these policies are often too general and do not lead to a real increase in the daily use of the language.** This suggests that many organisations are struggling to strategically and intentionally plan for culture change in the use of language in the workplace, and in effectively measuring progress.

In response to these challenges, the Commissioner has continued to work with organisations to develop policy models and practical resources to increase the use of Welsh in the workplace. While a number of organisations have taken advantage of this support, the resources available do not appear to have been used consistently across sectors. This **highlights the need for more structured centralised support and to encourage organisations to adopt evidence-based approaches.**

Having a clear picture of the Welsh skills of the workforce is essential for organisations to plan recruitment and training, and for them to be able to encourage their current Welsh speakers to use more of the language, in order to improve services. While some organizations have begun to assess the skills of their staff, a lack of reliable data continues to hinder many organizations from being able to plan their workforces, and most do not have a comprehensive baseline to map skills against demand or identify gaps in capacity.

As the body that leads and co-ordinates strategic activity in the workplace, **the Commissioner has continued to work with key national partners** – including the Welsh Government, the National Centre for Learning Welsh, and Coleg Cymraeg Cenedlaethol – with the aim of developing the use of Welsh in the workplace. The College is leading on the planning of tertiary education and training in Welsh to meet the needs of the future workforce whilst the Centre, through its Cymraeg Gwaith programme, develops the language skills of the current workforce and provides language training to workforces in several sectors. Both organisations focus on strategic areas such as health and care, sport and public services.

There is no doubt that the above organisations all share a vision about the potential of the workplace as a key area for developing new speakers and for increasing the use of the language. These key partners have a unique strategic contribution to offer to the field of bilingual workplace planning, and continuing to strengthen this collaboration is essential.



A language for
work and wider
horizons



Charmine Smikle is a service designer for Social Care Wales and is delighted to be in a workplace where Welsh is spoken naturally and actively encouraged.

Born and raised in Cardiff in a non-Welsh-speaking home, Charmine's early education differed from that of her older brothers, who attended English-medium schools. Her mother, influenced by friends who were also non-Welsh speakers but had chosen Welsh-medium education for their children, decided that this would be the right path for Charmine – and it is a decision she has always appreciated.



My brothers are a little older than me and had already started in English-medium education. But by the time it was time for me to go to primary school, my mum was friends with some parents, none of whom spoke Welsh, who had chosen a Welsh-medium school for their children, and she decided that would be good for me

I can't remember learning Welsh and to tell the truth, it happened quite naturally but I'm so glad I did because it has helped me enormously later in life.

After finishing secondary school, Charmine went on to study biological sciences at a university in London before travelling across the United States, Mexico, Guatemala and Belize with the intention of learning Spanish.



I lived with a family in Mexico whose English wasn't great, so I had to make the effort to speak Spanish. My Welsh was surprisingly helpful in learning the language. I had few opportunities to speak Welsh at university, but when learning another language, I felt I had a real advantage from already being bilingual.

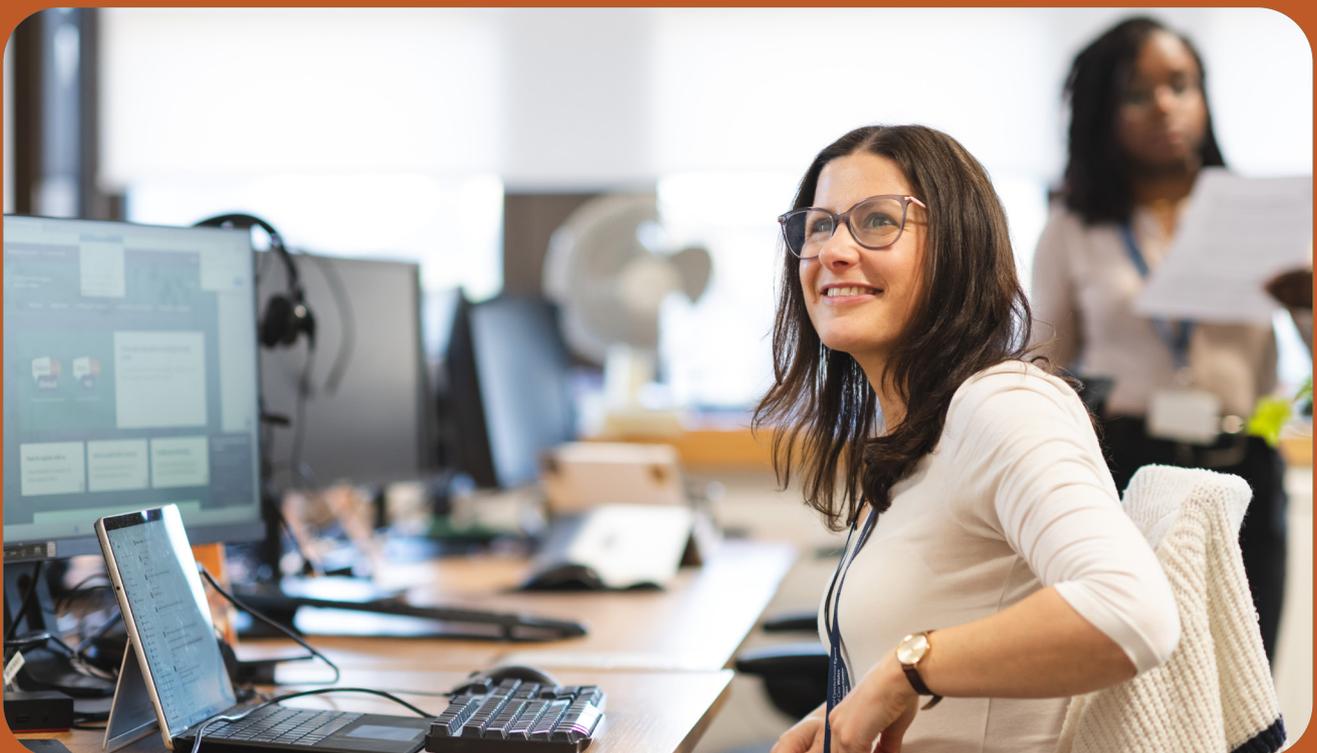
When she returned to Wales, Charmine worked in a range of roles before taking up her current post with Social Care Wales. It was there that she first fully appreciated the value of being able to use Welsh naturally in the workplace.



It immediately struck me how natural the use of Welsh is here. Bilingual conversations are encouraged, and there are opportunities to develop your skills – like informal cuppa-and-chat sessions. I don't think I'd fully realised before how important the Welsh language was to me, but looking back, it's been an advantage in every job I've had.

Using Welsh at work has also boosted my confidence to use it socially, and those two aspects are closely connected.

I'm aware that I still lack confidence in some situations – like giving presentations in Welsh – but the support is always there, and the fact that Welsh is an integral part of everyday work life makes everything easier.



Using the Welsh Language in health and care

The ability to use the Welsh language when receiving health and care services is crucial, especially as individuals are often in a vulnerable position when using these services.

The latest version of the Welsh Government's ***More than just words*** plan was published in 2022.³⁷ This is the national framework that outlines the Welsh Government's vision for ensuring that Welsh speakers can receive health and social care services in their language of choice. At the heart of the plan is the **principle of the Active Offer**, which places the responsibility on providers to offer services in Welsh rather than waiting for them to be requested by the individual.

During the reporting period, there has been a **significant change in the policy and legislative landscape, with Welsh language standards now more deeply rooted in the health and care sector**. This has led to clearer expectations being placed on public organisations to provide a wide range of services through the medium of Welsh – including correspondence, websites, public events and forms.

Although the standards impose duties on bodies to provide certain Welsh language services, they do not directly address the provision of clinical services. Instead, **there are specific requirements on bodies to formulate a policy on the provision of a primary care service and a 5-year plan outlining how they will increase capacity to carry out clinical consultations through the medium of Welsh**. These clinical services are considered to be the main focus of the *More than Just Words* plan in seeking to improve health and care provision through the medium of Welsh.

The 5-year period of NHS Health Boards and Trusts clinical plans came to an end during the reporting period. It is fair to say that the **progress during this first period was slow**. The plans were late in being published, and the any firm evidence of an increase in linguistic capacity during the first 5-year period is limited. However, we can now consider that a basic infrastructure has been put in place, creating a foundation for the sector to build on. The sector adopted new 5-year plans during 2025, it is essential for the sector to act with momentum and urgency if we are to see tangible improvements in the experiences of Welsh speakers of clinical services.

A key part of ensuring better experiences for Welsh speakers is to increase the capacity of the health and care sector workforce to offer services through the medium of Welsh. This is a particular example of the strategic collaboration taking place between the Commissioner, the National Centre for Learning Welsh and the Coleg Cymraeg Cenedlaethol. The development of Welsh-medium courses and provision in the field of health and care has been a priority for the College over the reporting period. Similarly, the Centre's significant contribution is seen as they develop specific language training for the health and care sector. This work is absolutely core to achieving some of the core objectives of the *More than just words* plan, and also to enable the Commissioner to exercise his regulatory powers to ensure that health boards improve their services and experiences for Welsh speakers.

³⁷ [More than just words: Welsh language plan in health and social care | GOV.WALES](#).

Since 2019, **specific duties have been imposed on independent primary care providers** to coincide with the advent of Welsh language standards for the health sector. One of the actions of the *More than just words* plan is to carry out a survey to understand the impact of these duties on the delivery of the Active Offer. This research will provide important evidence to understand the extent to which these duties are being implemented effectively and whether the monitoring and accountability framework needs to be strengthened. Consideration should also be given to the extent to which the current requirements need to be reviewed to ensure that they reflect the changes in the way clinical services are delivered in the coming years.

Beyond clinical services, our report on the performance of organisations in 2024, *Delivering change together*,³⁸ identified the need for the health sector to build on the momentum it has managed to create over the past year, and ensure that progress continues into the next period. The results of the **2024–25 surveys show that the sector has responded positively to that challenge and significant improvements can be seen**, including:

- An increase of 68% to 80% in the number of documents available in Welsh in a year – an increase of 42 percentage points compared to the 2021 data, when the first verification surveys were conducted
- An increase from 74% to 87% in the number of web pages available in Welsh in a year
- An increase from 64% to 72% in the proportion of social media posts available in Welsh in a year.

However, challenges remain in the provision of reception and telephone services. **It should be stressed that these challenges are not unique to the health sector.**

³⁸ Welsh Language Commissioner, *Delivering change together* (August 2024).



Language
of care



Ceri Innes-Parry has personal family experience of dementia and is now a member of a Welsh language and dementia care subgroup working to improve support for patients and their families across Wales.

In 2020, Ceri's mother was diagnosed with dementia, and four years later her mother-in-law received a similar diagnosis. She therefore knows first-hand the significant challenges involved in accessing treatment and support through the medium of Welsh. She also understands what kinds of opportunities and changes would make a meaningful difference.

A former headteacher, Ceri left her job to care for her mother and ensure that the Welsh language would be an integral part of that care.



Welsh is my mother's first language and, like many people living with dementia, she communicates mainly in her mother tongue. Her memories are closely connected to her Welsh culture – whether that is poetry from her school days, her Bible, the Eisteddfod, her family, everything that makes her who she is.

When a diagnosis of dementia is made, what has struck me most is the lack of awareness of the impact that positive reference to the Welsh language and culture has on an individual. In my view, disregarding a person's identity is disregarding the person.

I fully understand that it is not possible to provide assessments and care through the medium of Welsh in every part of Wales, but I would like to see dedicated training offered across the care sector to emphasise the importance of a person's language and culture to the way they respond and to their mental wellbeing. Unfortunately, in my experience, Welsh is not always offered proactively, and more than that, there is no real understanding of the impact this has on the individual.

After being contacted by Alzheimer's Cymru, Ceri was invited to give feedback on her experiences, and this led to her becoming a member of a Welsh language and dementia care subgroup that provides advice and feedback to the Government as they develop a new action plan.



Joining this group was extremely beneficial for me as I learned a lot and gathered further information about the support available. It was also good to see that I was not on my own and that I – and therefore my mother and mother-in-law – still had a voice.

On one level the group operates very strategically, but what I can offer, based on my personal experience, are suggestions for small things that can be implemented immediately. For example, ensuring that care homes play Welsh music, ask artists to sing in Welsh, have bilingual signs, and use bilingual flashcards. Above all, remembering that a simple 'Bore da' can make a world of difference.

Although she wants to remain positive and hopeful about the future, Ceri is concerned that things are not moving fast enough.



I often feel that I have to raise the same issues and barriers time and time again. I sometimes think that a situation has been resolved but, because of a lack of communication, I have to repeat the same points all over again. But my hope is that, in five years' time, we will be in a healthier position regarding the Welsh language and dementia, with training, understanding and action on the importance of language and culture fully embedded across the health sector in Wales.



Policy making standards and mainstreaming the Welsh language

There is no doubt that the **policy making standards continue to play a vital role in ensuring that the Welsh language remains central to public policy development.** They set a requirement to consider the impact of policies on the language in a meaningful way – including direct impact on Welsh language services, and the wider impact on communities, opportunities to use the language, and the education infrastructure for example.

This is not simply a matter of technical compliance, it is a strategic mechanism designed to ensure that the Welsh language is treated as an integral consideration as organisations decide how to carry out their functions. The expectation is clear: **public organisations must make a conscientious and reasonable effort to assess the potential impact of their decisions on the Welsh language**, not as a secondary consideration but as an integral part of the process. And this principle has now been reinforced in a recent ruling by the Welsh Language Tribunal.

The standards set out two requirements when publishing consultation documents: to consider the impact on the Welsh language and to seek views regarding the Welsh language. Monitoring during the reporting period shows that awareness of these requirements, and the extent to which they are met, varies significantly between organisations. While some have robust arrangements in place to ensure compliance, others show limited awareness or fail to fully meet the standards.

There has been a significant increase in organisations putting administrative arrangements in place to comply with the policy-making standards. Templates, guidelines and training have been developed to facilitate the process. However, the **evidence shows a clear gap between these arrangements and their practical implementation.** Impact assessments often include generic factual statements on the Welsh language without identifying specific impacts, meaning that the requirement to make a conscientious effort is not fully met.

The context or subject area of the policy in question is key in considering what is required to be able to demonstrate a conscientious effort. Decisions that are linguistically sensitive, such as the reorganisation of education, call for deeper consideration, of course. However, this level of consideration is not always evident.

This emphasises the need to strengthen understanding and meaningful action, in order to close the gap between policy and action, and achieve the regulatory outcome we have set out the outcome: **organisations giving due regard to the potential impacts of their policy decisions on the Welsh language.**

The Welsh Language Tribunal

The Welsh Language Tribunal is a statutory tribunal established by the Welsh Language Measure. The role of the Tribunal is to decide on appeals against decisions made by the Welsh Language Commissioner in relation to the Welsh Language Standards. The final year of this reporting period marks a significant milestone: **ten years since the establishment of the Welsh Language Tribunal**. Over the past decade, the Tribunal has developed into a robust and independent statutory body, playing a vital role in ensuring fairness and consistency in the operation of the standards regime.

Table 1: Number of applications to the Welsh Language Tribunal (2020–25)

Year	Number of applications received
2020–21	13
2021–22	3
2022–23	1
2023–24	4
2024–25	3
Total	24

(Source: Annual Reports of the Welsh Language Tribunal)

As shown in Table 1, the number of applications received by the Tribunal during the reporting period is low in reality, with a marked decrease since 2020/21. In that year 13 cases were recorded, with applications for a review of the Commissioner’s decision not to investigate accounting for 70% of cases. But by 2024/25 only three cases had been submitted to the Tribunal. This suggests an **increasingly stable climate in terms of compliance with standards and acceptance of the Commissioner’s statutory determinations**.

The Tribunal has not received any appeal under Section 58 of the Measure during the reporting period. Section 58 allows organisations to challenge a requirement to comply with a standard if they consider it unreasonable or disproportionate. The absence of appeals in this area, coupled with the overall decline in the number of cases, indicates the robustness and efficiency of the standards-imposition process. It also suggests that the standards themselves are considered proportionate and appropriate by the organisations subject to them.

Although the number of cases that have been brought before the Tribunal has been relatively low during the reporting period, **the decisions made have set important precedents, and have had a positive impact on the practices of organisations**. Without a doubt, the most significant case heard by the Welsh Language Tribunal during the reporting period was Neath Port Talbot Council’s appeal regarding their failure to consider the impact of a decision to reorganise three primary schools on the Welsh language.

Details of the case can be read in full on the Tribunal’s website,³⁹ but the outcome of the case was that the Tribunal agreed with the Commissioner: the Council had not complied with the standards that require public bodies to consider the impact of policy decisions on the Welsh language. **Superficial statements in consultation documents or deferring an assessment until after a consultation period are not sufficient.** This ruling is an important one as it sets a clear precedent: public organisations must make a conscientious and reasonable effort to consider the impact of policy decisions on the Welsh language.

Opportunities to use the Welsh language services

As part of the co-operation agreement between the Welsh Government and Plaid Cymru (2021), a commitment was made to implement standards for public transport, health regulators, public bodies that are not yet subject to the standards, and water companies. It was also agreed that work would begin on implementing standards for housing associations during the Senedd term.

During this period, **significant progress has been made in extending and amending Welsh language standards, further strengthening the statutory framework created by the Welsh Language (Wales) Measure 2011.** The Welsh Government has introduced a number of new and revised regulations, extending the standards to most of the sectors and organisations in line with commitments. In addition, the Government amended five sets of existing regulations to make them applicable to additional organisations. This enables the Commissioner to issue them with statutory compliance notices, ensuring that these organisations implement the standards.

Below is an overview of those sectors and organisations:

Group of organisations	Specific organisations	Date of approval of regulations	Date standards implemented
The Corporate Joint Committees (Amendment of Schedule 6 to the Welsh Language (Wales) Measure 2011) Regulations 2021 The Welsh Language Standards (No. 1) Regulations 2015 (Amendment) Regulations 2021	Corporate Joint Committees (4 organisations)	1 Ebrill 2021	30 October 2024 ⁴⁰
The Welsh Language Standards (No. 8) Regulations 2022	Health Professions Councils (9 organisations)	31 October 2022	6 December 2023
The Welsh Language Standards (No. 9) Regulations 2023	Water and Sewerage Undertakers (2 organisations)	31 October 2023	13 August 2025
The Welsh Language Standards (No. 1, No. 2, No. 4, No. 6 and No. 7) Regulations (Amendment) Regulations 2025	A variety of public organisations (10 organisations)	28 March 2025	These standards have not yet come into effect.

³⁹ TyG/WLT/22/01: Neath Port Talbot County Borough Council | Welsh Language Tribunal (Accessed January 2026).

By the end of 2025, the Senedd had approved eight sets of Welsh Language Standards Regulations, each applying to a specific group of organisations, along with two sets of amending regulations. **As a result, 133 organisations are now implementing the standards.**⁴⁰

The Welsh Government also consulted on draft Regulations for Registered Social Landlords providing services to people in Wales. This would enable the Commissioner to impose language duties on these organisations, increasing opportunities for people to use the Welsh language when interacting with them.

Although a commitment to implement standards for public transport is included in the co-operation agreement, it is disappointing that regulations for the sector have not been introduced during the reporting period. However, it should be noted that Transport for Wales – the leading provider of public trains in Wales, and a not-for-profit limited company wholly owned by the Welsh Ministers – is already subject to the standards imposed on the Welsh Government.

While a significant number of the organisations named in the Welsh Language (Wales) Measure 2011 Schedules are now subject to the standards, several bodies and sectors remain outside the regime. The Government has the ability to expand the provisions of the Measure, ensuring that more organisations have to comply with the standards. These include Crown bodies and UK Government departments, gas and electricity service providers, postal and telecommunications. At present, a number of these organisations operate Welsh language schemes under the Welsh Language Act 1993 – **a different framework which does not grant the Commissioner the same enforcement powers.**

Using Welsh with businesses and charities

Businesses and charities are important service providers with the potential to shape the daily linguistic experiences of consumers and customers, whether browsing on the high street, shopping in supermarkets, getting advice from a charity or sorting out your financial affairs at a bank. **These are also sectors where the Commissioner does not, of course, have enforcement powers.** We must rely upon the power of persuasion and influence.

The Commissioner's Hybu Team works with businesses and third sector organisations to demonstrate the benefits of using the Welsh language and work closely with organisations to produce exciting development plans that lead to an increase in the use of Welsh. The Commissioner has supported all types of organisations – from large supermarkets and international charities to smaller businesses and third sector organisations operating locally.

⁴⁰ The standards come into force for those organisations named in the Welsh Language Standards (No.1, No.2, No.4, No.6 and No.7) (Amendment) Regulations 2025 during 2026.

An important development during the reporting period was the **launch of the Cynnig Cymraeg scheme in June 2020**. The Cynnig Cymraeg is an official recognition by the Commissioner, and is an **opportunity for businesses and charities to demonstrate to the public that they are organisations that take pride in the Welsh language and are committed to using it**. To receive the Cynnig Cymraeg, organisations must draw up a Welsh language development plan in cooperation with the Welsh Language Commissioner and operate it successfully for a period. Organisations must also highlight at least five services they are proud to be able to offer through the medium of Welsh, such as self-service tills, a website and social media accounts.

Between the launch of the scheme and the end of the reporting period, **169 organisations received the Cynnig Cymraeg**, including Cancer Research Wales, Aldi, Ffilm Cymru, the Royal Welsh Agricultural Society, Disability Sport Wales, Boots and NSPCC Cymru.

Table 2: The number of organisations that have received the Cynnig Cymraeg during the reporting period

Financial year	Organisations
2020–21	12
2021–22	28
2022–23	26
2023–24	45
2024–25	48
2025–26	10 (to date)

(Source: Commissioner's Hybu Team Data)

As organisations work towards the Cynnig Cymraeg, the range and availability of Welsh-language services available to users has increased.

The number of organisations that have received the Cynnig Cymraeg has increased significantly since 2023, partly as a result of collaboration with strategic partners such as Arts Council of Wales and ARFOR. These funding bodies are requiring organisations to work towards the Cynnig Cymraeg as part of their grant conditions. This collaboration with strategic partners has been key in reaching and influencing new organisations.

Organisations clearly see value in working with the Commissioner to obtain the Cynnig Cymraeg.

One benefit of working towards the Commissioner's official recognition is the formalisation of Welsh language services across the organisation and that consideration is given to how an organization plans and develops the workforce to deliver those services. Organisations must submit an annual report on the activities contained in their development plans and their Welsh Language Offer and, in co-operation with the Commissioner, will review their Welsh Language Offer every three years.

In 2023 the Commissioner conducted research which looked at how the Welsh language helps charities fundraise. The findings demonstrated that using the Welsh language can offer clear financial advantages and that using the Welsh language enables charities to:

- visit events or organisations that operate in Welsh
- sell Welsh goods
- advertise in Welsh
- create Welsh language templates and fundraising packages
- engage with the Welsh language media.

It has been shown that using the Welsh language enables charities to reach new audiences, which in turn helps generate financial support. For example, the use of Welsh enabled BHF Cymru to visit Welsh language organisations. Following one such visit, Merched y Wawr chose BHF Cymru as their charity of the year and raised around £30,000 for the organisation.

You can read the research in full and see other examples of how charities benefit financially from using the Welsh language on the Commissioner's website.⁴¹

⁴¹ Welsh Language Commissioner, [Welsh – your fundraising tool](#).



A language for
support and
opportunity



Established in 1985, GISDA is a charity that supports vulnerable young people under 25 years old in Gwynedd. It provides a wide range of services, but its main service is to provide support with homelessness, and it operates houses and hostels across the county.

Gwynedd is one of the strongholds of the Welsh language, and the ability to communicate with young people – many of whom face significant challenges – in their preferred language is essential, according to the Chief Executive, Siân Tomos.



The young people we work with are able to communicate more effectively in their first language, especially if they are discussing difficult, sensitive, or emotional matters. Being able to talk in Welsh is extremely important, and that's why we believe so strongly in offering a Welsh-medium service.

When young people want to move from a hostel to a house, for example, being able to communicate exactly what they want and how they feel makes a huge difference.

The Welsh language is a key part of our values; our entire workforce is bilingual and we also support new learners.

We have plenty of evidence that communication through the medium of Welsh is important – it is an integral part of what we offer young people. Welsh will remain a part of GISDA for as long as we exist.

One of the young people who has been supported by GISDA is Reece.



I live in Caernarfon and I am one of GISDA's young people who receives housing support. I feel that it's important that services are available in Welsh because Welsh is my first language. And even though I don't speak it every day, it is my language.

If you look at organisations like GISDA that provide support for young people, very often you don't get that through the medium of Welsh. So I think it's so important that these services are available in Welsh.

Relevance of the Welsh language standards

Welsh language standards are detailed, prescriptive requirements set out in subordinate legislation. Their strength lies in the fact that they are statutory duties, providing clarity and certainty for both organisations and service users alike. However, in a rapidly changing world, there is a **danger that such standards may become outdated, especially as technology reshapes the way services are designed and delivered.**

Since their introduction in 2016, and indeed during throughout the period covered in this report, public services have undergone substantial transformation, with developments such as digital platforms, automation and the increasing use of artificial intelligence (AI). **AI can now process spoken language with far greater accuracy than before, creating new opportunities to use Welsh in digital systems more naturally and more efficiently.** This has the potential to enable organisations to provide more personal, accessible and efficient services, ensuring that the Welsh language remains relevant and visible in a digital world.

However, **when adopting new technologies, organisations must continue to comply with their duties**, ensuring that Welsh is not treated less favourably than English. To provide guidance on the application of AI in terms of Welsh language duties, the Commissioner issued a regulatory policy statement in 2025.⁴²

It is essential that the standards are regularly reviewed to reflect consumer habits and technological advancements. As service providers adopt AI-generated self-service systems and solutions, it must be ensured that the requirements remain relevant, practical and effective – including provision for digital interfaces, automated services and processes using intelligent data – so that the use of the Welsh language remains easy, natural and safe for users.

⁴² Welsh Language Commissioner, [Artificial Intelligence and the Welsh Language: Welsh Language Commissioner's Regulatory Policy Statement](#).

4.3 Priorities and opportunities to strengthen the position of the Welsh language over the next five years

Looking ahead to the next five years, clear strategic opportunities and priorities are emerging – **opportunities with the potential to drive fundamental change in the quality and availability of Welsh language services, and to expand opportunities for people to use the language.**

Since their introduction in 2016, Welsh language standards have strengthened the status of the language and provided a level of assurance to organisations and service users alike, creating new opportunities for people to use Welsh. There is no doubt **that the Welsh language standards are the most effective mechanism for improving provision and ensuring consistency of Welsh language services.** To further increase these opportunities, the ongoing work of extending the standards to new organisations and sectors is a key strategic step. The next few years therefore offer a significant opportunity to extend the Welsh Language Standards to new sectors and organisations. While strong foundations have been laid with a number of new regulations introduced during 2021–25, critical gaps remain.

Extending the standards to UK Government ministerial and non-ministerial departments, providers of public transport services, as well as other organisations and sectors named in the Measure are steps that have the potential to expand the use of the Welsh language on a national scale. **This work will be key to ensuring consistency and new opportunities for Welsh speakers.**

There is also potential to create new opportunities for people to use the Welsh language with businesses and charities. The number of organisations that received the Cynnig Cymraeg increased significantly between 2023 and 2025, partly due to working with strategic partners to influence new organisations, and it is important to continue this cooperation over the coming years.

It should also be emphasised that a number of the organisations that received the Cynnig Cymraeg between 2023 and 2025 were smaller organisations as a result of a strategic working relationship. Whilst we recognise the importance of these smaller organisations to community linguistic experiences, **greater emphasis must be placed on targeting large businesses and charities operating nationally in the coming period as they are the ones which people engage with most frequently.**

There is also a need **to respond proactively to a rapidly changing digital world.** As automated responses, self-service interfaces and artificial intelligence become integral to service delivery, **standards guidance needs to be updated to ensure that the Welsh language is supported and strengthened in the digital space.**

Priority



The Welsh language standards must be reviewed to ensure they remain relevant and reflect current and future models of service provision. The Welsh Government must also facilitate an increase in the opportunities to provide Welsh language services by:

- introducing Welsh language standards regulations for Ministers of the Crown; the consent of Secretaries of State would be required to name them in regulations.
- introducing Welsh language standards regulations for UK Government non-ministerial departments.
- developing a clear programme for extending Welsh language standards to other sectors and organisations listed in the Measure and considering expanding to other key sectors.

While many organisations now offer good-quality Welsh language services, **inconsistencies continue to undermine the user experience**, particularly in sectors such as health, care and education. There are noticeable improvements in documents, websites and social media, but access to face-to-face and telephone services remains a challenge. The next period, therefore, **is an opportunity to act more strategically, targeting those gaps in provision which most influence user experience.**

Looking ahead, the next period will present opportunities to further strengthen our strategic approach to co-regulation. The outcomes already published lay a solid foundation for partnership, and we are keen to continue to foster open dialogue, share good practice, and support organisations to take bold action ensuring the best outcomes for service users. Through this approach, **regulation will continue to be a strategic tool to increase opportunities to use the Welsh language, ensuring that services meet user expectations and contribute to the national vision.**

In this context, **strategic workforce planning and recruitment are emerging as some of the most transformative opportunities.** Beyond the education system, this is the area that has the most potential to influence opportunities for individuals to learn and use the Welsh language in their daily lives, contributing directly to the core objectives of *Cymraeg 2050*. There is a real opportunity to build on what the education system achieves by ensuring opportunities for people to use Welsh daily at work. **Increasing both the formal and informal use of Welsh in the workplace has the potential to influence people's perceptions of the importance of the language, to build confidence in the language, and to generate wider use of Welsh in the community.**

For organisations wishing to increase their capacity to provide Welsh language services – and therefore expand opportunities for people to use the language daily – **greater focus and strategic investment** in language planning within workplaces is essential. **Developing consistent methods to measure usage, establishing a solid baseline of language skills, identifying gaps between skills and service demand, and reviewing and improving recruitment practices will be vital steps to enable organisations to work through the medium of Welsh.** Ultimately, these are the primary mechanisms for increasing capacity and will make the biggest difference in the next five years in building a confident and sustainable workforce, which provides high-quality Welsh language services.

Priority



The Welsh Language Commissioner must be enabled to intensify our work in workplaces through the provision of additional investment to develop and deliver a coherent strategy to increase the use of Welsh in the workplace. This strategy would target and support organisations across all sectors to plan strategically for increasing the use of Welsh in their workplaces. Such a strategy would coordinate national workplace planning activities, building on the strategic collaboration that is already taking place between other key partners in this field.

With the emphasis on the need to focus on outcomes for Welsh speakers, the importance of the provision of health and care services through the medium of Welsh cannot be overstated. Despite some significant and positive developments during the reporting period, the **reality is that Welsh speakers are not always able to receive clinical services through the medium of Welsh.** While the principle of the active offer is accepted and discussed as a policy concept, it does not always impact the way care is planned, delivered and funded. Far too often Welsh speakers have to accept clinical services through the medium of English. **Current health and social care provision in Wales still falls short of the needs of a bilingual nation.**

Over the next five years, **the use of Welsh in health and care services must be strengthened**, particularly in clinical settings, where the language can have a profound impact on a person's experience in vulnerable situations. Although core infrastructure is now in place through the sector's *More than just words* and five-year clinical plans, the evidence shows a **continuing need to increase Welsh language capacity in the core clinical services on which users depend on on a day-to-day basis.** This includes consultations, assessments and care from therapists, specialist nurses and other health professionals. These are the areas with the greatest demand and, in turn, the greatest risk of failing service users if services do not align with their linguistic needs. This directly impacts quality, outcomes, and clinical safety.

Meeting this challenge **requires alignment between the legal framework, statutory standards and national strategies, with a clearer focus on strengthening clinical services.** The coming years should mark a move from laying foundations to delivering tangible results, ensuring that strategic planning translates into measurable improvements for Welsh-speaking patients.

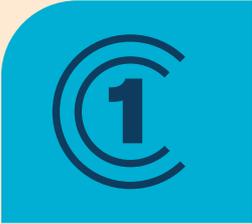
Priority



Clinical care for Welsh speakers must be transformed by focusing resources and effort on recognised priority areas. Central investment by NHS Wales in the Welsh language should be increased by funding a department of specialist lead officers who will ensure that care in Welsh is an integral part of all aspects of care pathways in these priority areas.

Funding a department of lead specialist officers would enable them to work within and across departments and share good practice across the health and care service working with professional bodies, regulators, inspectorates, health boards and health bodies, social services and social care leaders, charities and others involved in patient care pathways. They will also play a critical role in the development of strategies and action plans in these areas, particularly in **achieving the objectives of *More Than just words* and the successful implementation of the health boards' 5-year plans** for increasing capacity to provide clinical care through the medium of Welsh.

Commissioner's priorities



1

The rates of Welsh language transmission from one generation to the next must be improved. Achieving this requires strengthening the position of the language in areas with a high density of Welsh speakers, where transmission remains relatively robust. The recommendation of the Commission for Welsh-speaking Communities to establish areas of higher linguistic significance must be implemented, and additional investment should be provided to Mudiad Meithrin, the mentrau iaith and others in the field to enable them to target interventions more effectively and at greater scale.



2

There must be significantly greater investment in developing the Welsh language skills of the early years workforce. This requires expanding the Welsh-language training embedded within the sector's training courses and apprenticeships, and the ongoing professional development available to all workers. To achieve the increase in Welsh-language skills, the recruitment and retention of staff must be facilitated through an overall increase in resources to the sector.



3

The challenge of creating an increasingly bilingual education workforce must be addressed with urgency and ambition. Strong intervention from the Welsh Government is needed to increase the number of learners leaving school as confident Welsh speakers. The Welsh Government should establish a Welsh-language training framework that forms a compulsory part of the training, induction, and professional development of all teachers.



4

There must be an opportunity for all learners to develop their Welsh language skills in the post compulsory education and training sector. To achieve this, appropriate investment is required and greater strategic emphasis must be placed on ensuring that Welsh speaking learners receive a higher proportion of their education and training in Welsh. Increasing the percentage of fluent Welsh speakers who choose to study through the medium of Welsh must be a priority for the sector over the next five years.



5

There must be far more opportunities, especially for children and young people, to use the Welsh language in communities, and to take part in cultural, community and sporting activities. To achieve this, and as recommended by the Commission for Welsh-speaking Communities, the Welsh Government must strengthen community-based language planning frameworks and increase the funding and resources available to key partners responsible for delivering these activities and events in Welsh.



6

Key partners must work together to develop a full understanding of the challenges and opportunities involved in increasing the use of Welsh in digital media and broadcasting. Building on this collaboration, a national digital strategy, led by the Welsh Government, should be developed outlining the key contributions of all partners.



7

The further decline of the Welsh language in the areas where it is currently at its strongest must be prevented if we are to strengthen its position across the whole of Wales. The Welsh Government must urgently publish a white paper to implement the Commission for Welsh-speaking Communities' key recommendation to establish areas of higher density linguistic significance.



8

The Welsh language standards must be reviewed to ensure they remain relevant and reflect current and future models of service provision. The Welsh Government must also facilitate an increase in the opportunities to provide Welsh language services by:

- introducing Welsh language standards regulations for Ministers of the Crown; the consent of Secretaries of State would be required to name them in regulations.
- introducing Welsh language standards regulations for UK Government non-ministerial departments.
- developing a clear programme for extending Welsh language standards to other sectors and organisations listed in the Measure and considering expanding to other key sectors.



9

The Welsh Language Commissioner must be enabled to intensify our work in workplaces through the provision of additional investment to develop and deliver a coherent strategy to increase the use of Welsh in the workplace. This strategy would target and support organisations across all sectors to plan strategically for increasing the use of Welsh in their workplaces. Such a strategy would coordinate national workplace-planning activities, building on the strategic collaboration that is already taking place between other key partners in this field.



10

Clinical care for Welsh speakers must be transformed by focusing resources and effort on recognised priority areas. Central investment by NHS Wales in the Welsh language should be increased by funding a department of specialist lead officers who will ensure that care in Welsh is an integral part of all aspects of care pathways in these priority areas.

What next?

If you would like to discuss or comment on the contents of the report, please contact us by e-mail at post@cyg-wlc.cymru. You can read the full report and find more information on our website welshlanguagecommissioner.wales.

You can also follow us on Facebook, Instagram and LinkedIn, and remember to use #Adroddiad5Mlynedd #5YearReport if you contribute or share posts on social media.

