The Annual Population Survey (APS) is a large-scale UK wide survey, covering topics such as employment, housing, ethnicity, health and education. In Wales, questions are also included on people’s ability in Welsh and how frequently they speak Welsh.

The Census of Population is the key source used to measure the number of Welsh speakers in Wales. The questions on the Welsh language were included in the APS primarily for cross-analyses purposes. Nevertheless, as the APS provides more regular information, there is considerable interest in using the APS to look at trends in the Welsh language between censuses.

A far greater number of people are recorded as speaking Welsh in the APS than in the Census and this has grown in recent years. This bulletin expands on a recent blog by the Chief Statistician, which gave a brief discussion on the interpretation of the Welsh language data in the APS.

The bulletin considers how the trends vary across different demographic groups and considers some of the differences between the APS and the Census.

The APS results should not be used to measure progress towards the Welsh Government target of a million Welsh speakers. Nevertheless the APS, as with other surveys, provides a useful indicator of potential trends over time which should be used in conjunction with other data.

This statistical bulletin is split into 4 chapters:

- **Chapter 1** presents the APS results on speaking Welsh;
- **Chapter 2** presents the findings for other skills in the Welsh language (i.e. reading, writing and understanding spoken Welsh);
- **Chapter 3** presents the findings on how often people speak Welsh; and
- **Chapter 4** explores some of the possible reasons why the APS and Census results differ.
Background

The Welsh Government’s Welsh language strategy Cymraeg 2050 sets out a vision for reaching a million speakers by 2050. The trajectory towards a million Welsh speakers was based on 2011 Census data and the strategy clearly states that progress towards this target will be monitored using future census data. However, as the census is only held every ten years, there is a desire to monitor progress more frequently.

The Annual Population Survey (APS) is a large scale survey which can provide quarterly data on the Welsh language. However, the results from the APS are significantly higher than the results of the Census. The last Census in 2011 reported that 562,016 people were able to speak Welsh, while the APS for same time period (2011) reported that there were 769,000 – almost 207,000 more Welsh speakers.

Therefore, while it is not possible to use the APS results to measure the progress of Cymraeg 2050 and its target of a million Welsh speakers, the APS provides us with a very large sample of data on Welsh speakers over a number of years and could be used as a useful indicator of potential trends.

The Annual Population Survey (APS) is a UK-wide face-to-face survey of around 320,000 people conducted by the Office for National Statistics. It has been running in its current form since 2004. The primary purpose of the survey is to provide information on social and socio-economic variables at local levels. This is the key source of information used by the UK government for employment-related statistics, particularly about economic inactivity.

In Wales, around 35,000 people are included in the survey each year and the following questions are included about the Welsh language for those aged three or over:

- Do you understand spoken Welsh?
- Can you speak Welsh?
- Can you read Welsh?
- Can you write in Welsh?
- How often do you speak Welsh?

This statistical bulletin aims to present a more detailed analysis of the results of these questions on the Welsh language included in the APS, as well as explore some of the possible reasons why the Census and APS results differ.

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1 Results presented in this article for 2001 to 2003 are from the Labour Force Survey, before it became part of the APS.
Chapter 1: Speaking Welsh

The ability to speak Welsh is the statistic that is most commonly reported and attracts the most interest. The APS reported that for the year ending in December 2018, 898,700 people (or 29.9%) of people aged three or over reported that they were able to speak Welsh.

Chart 1 shows that the number of people reporting to be able to speak Welsh has been gradually increasing each year since March 2010 (25.2%, 731,000), after they had been gradually declining from 2001 to 2007. The latest results bring the percentage of Welsh speakers back in line with the levels reported by the APS in 2001 (when 30.0%, or 834,500 people were reported to be able to speak Welsh).

This is the largest number of Welsh speakers that has ever been reported by the APS. While survey data can fluctuate from quarter to quarter, the APS results show a steady increase over recent years, which indicates that the number of people reporting that they speak Welsh could be increasing.

There have been similar increases in the National Survey for Wales in recent years when looking at Welsh speakers (including those who report they speak only a few words). Therefore these surveys could be capturing similar trends in either an increasing number of people speaking a little Welsh, or being more likely to report that they do.

Chart 1: Number of people aged three or over able to speak Welsh, 2001 to 2018

The APS results have consistently been much higher than the Census results. The Census results for 2001 and 2011 have also been plotted on this chart to show the differences between the two sources for the same time periods. It can be seen that, between the 2001 and 2011 Censuses, there was a decrease of 20,000 Welsh speakers. The APS in 2001 and 2011 also reported a decline for the same time period, but of 65,500. And whilst the number of Welsh speakers was also well over 800,000 in 2001 the Census only reported 582,400 Welsh speakers. Given that the baseline for the target of a million Welsh speakers by 2050 is based on Census estimates, this highlights that the APS figures cannot be used to monitor progress against that target.
Speaking Welsh, by age

Chart 2 shows the proportion of people reporting to be able to speak Welsh, in the year to December 2018, by age. The percentage of children who report being able to speak Welsh increases with age, and peaks for children aged 12 to 15 at 68%. The percentage then declines as respondents get older, with a slight increase again for those aged 85 or over.

Chart 2: Percentage of people reporting to be able to speak Welsh, by age group, 2018

The figures for children are significantly higher than those seen in other sources, including data collected through schools or from the previous Welsh Language Use Survey as well as the last Census.

APS respondents must be aged 16 or over, therefore it should be borne that in mind that the responses given by those aged under 16 will have been provided by their parents or other adults within their household, and not by the individuals themselves.

APS respondents are also asked to respond on behalf of other adult household members. When these ‘proxy’ responses are removed, the proportion of adults (aged 16 or over) who report being able to speak Welsh is lower (23% instead of 25%). The difference between ‘proxy’ responses and ‘actual’ responses is at its greatest for the youngest adult respondents (i.e. those aged 16-24), suggesting that fellow household members may overestimate other household members’ ability in Welsh. Chart 3 below shows how the results differ by whether they are personal responses or proxy responses.

Chart 3: Percentage of people reporting to be able to speak Welsh, by age group, by type of response, 2018
To look at this trend by single years of age, we have grouped three years of data together to provide a larger sample (2016-18). This is shown on Chart 4 below. Also plotted on Chart 4 are the results from the 2011 Census and from the APS around the 2011 Census (2010-12).

**Chart 4: Percentage of people able to speak Welsh, by age, source and years**

![Graph showing percentage of people able to speak Welsh by age, source and years.](image)

Chart 4 shows that when we look at the APS data for being able to speak Welsh for the years 2010-12 (i.e. around the time of the 2011 Census) the overall trend is similar to that of the Census. There is an increase for the young from 3 to 9 years old and then another increase from the age of 11 to around 15 years old, which could be attributed to attending primary then secondary school. After this the proportion who can speak Welsh appears to decline significantly between the age of 16 and 21, followed by a softer decline, before stabilising for those in their thirties onwards. The Census data although at a lower level than the APS data, does seem to be consistently around 4-5 percentage points lower than the APS data for those who are 24 years old or older, however for those aged 7 to 20 the difference is much larger at around 15 percentage points.

When comparing the APS results for 2016-18 with the APS results from 2010-12, we see from Chart 4 that although the data does fluctuate, on the whole the proportion reporting being able to speak Welsh in 2016-18 at all ages averages at around 3 percentage points higher than it did in 2010-12.
Chart 5 shows how the percentages who report being able to speak Welsh have changed for broader age groups over time.

Chart 5: Percentage of people aged three or over able to speak Welsh by age group, 2001 to 2018

Chart 5 shows once more that it is those aged 3 to 15 that are the most likely to report they are able to speak Welsh, and that it is this age group that has seen the greatest increase in the percentage of Welsh speakers over the past decade. A third of the increase in the number of Welsh speakers since 2008 can be attributed to this age group.

It is not clear to us whether the increase shown for those aged 3 to 15 over recent years is real or due to a change in parents’ perception of their children’s ability in Welsh for some reason. The increase seen here for this age group is not as evident when analysing administrative data reported by schools.

There have also been smaller increases for other age groups in recent periods, but overall these have recovered these age groups to levels that are similar to what they were in 2001.
Speaking Welsh, by gender

Chart 6 looks at the percentage of both males and females who report being able to speak Welsh from 2001 to 2018. In the year ending in December 2018, we see that 28% of males report being able to speak Welsh compared with 32% of females.

Chart 6: Percentage of males and females aged three or over able to speak Welsh, 2001 to 2018

As shown in Chart 6, whilst both genders follow a similar overall trend, females are consistently more likely to report being able to speak Welsh than males. It also appears that the gap between males and females has been widening over recent years.

Chart 7 shows these results for the year ending in December 2018 by gender and age. We can see that females of all ages are more likely than males to report being able to speak Welsh. This difference between the sexes is at its greatest for those aged 16 to 19 and reduces with age.

Chart 7: Percentage of males and females aged three or over able to speak Welsh, by age, 2018
Speaking Welsh, by local authority

Chart 8 gives the percentage of people who report being able to speak Welsh by local authority area for the year ending in December 2018. Gwynedd, Isle of Anglesey and Ceredigion are the local authorities with the highest percentages, whilst Bridgend, Torfaen and Monmouthshire have the lowest percentages.

Chart 8: Percentage of people aged three or over able to speak Welsh, by local authority 2018

However, the local authorities with the largest numbers of Welsh speakers are Carmarthenshire, Gwynedd and Cardiff with 94,100, 91,900 and 81,000 reporting being able to speak Welsh respectively. The local authorities with the smallest numbers of Welsh speakers are Merthyr Tydfil, Blaenau Gwent and Torfaen with 10,900, 13,200 and 15,000 respectively. The APS results for each local authority over time can be found on StatsWales.
We saw from Chart 1 that the number of people who report that they speak Welsh has increased over the past decade. Chart 9 shows the change in the percentage of Welsh speakers for each local authority since 2008.

**Chart 9: Difference in percentage points between the percentage of people able to speak Welsh in 2008 and 2018, by local authority**

We can see for all local authorities except Bridgend, Torfaen and Flintshire, there has been an increase in the percentage reporting to be able to speak Welsh over the past decade. Ceredigion has seen the greatest percentage increase, from 52% in 2008 to 60% in 2018 (an increase of 8 percentage points).
Chapter 2: Reading, writing and understanding spoken Welsh

As well as asking about being able to speak Welsh, the Annual Population Survey asks respondents about their ability to understand spoken Welsh, read and write Welsh. These results are shown alongside people’s ability to speak Welsh in Chart 10.

Chart 10: Percentage of people aged three or over able to understand, read, write and speak Welsh, 2001-2018

Chart 10 shows that the increases in self-reported Welsh skills in the APS have not been limited to those reporting they can speak Welsh and similar trends have been seen in understanding, writing and reading. As might be expected, we see that more people will say they understand spoken Welsh than can speak Welsh. This is followed by reading Welsh then being able to write in Welsh. For the year to December 2018, 35% reported being able to understand spoken Welsh, 30% being able to speak, 27% being able to read and 24% being able to write. In the 2011 Census these percentages were 23%, 19%, 18% and 16% respectively.

As for speaking Welsh, females are more likely to report being able to understand spoken Welsh, read and write in Welsh as shown in Chart 11. The gap between males and females appears to be consistent for all four skills.

Chart 11: Understanding spoken Welsh, speaking, reading, and writing, by gender, 2018
Chart 12 shows how understanding spoken Welsh, speaking, reading and writing vary by age.

Chart 12: Understanding spoken Welsh, speaking, reading, and writing, by age, 2018

Here we see that the gap between the ability to ‘understand and speak’ Welsh and ‘read and write’ Welsh is at its largest for those ages 3 to 7. This gap narrows as children progress through the education system. For children aged 3 to 7 the gap between understanding spoken Welsh and speaking Welsh is marginal, but this gets gradually wider as respondents get older. A similar relationship can be observed for reading and writing, whereas for children aged 8 to 19, there is very little difference between the percentages who can read and write in Welsh however, the gap becomes wider from the age of 20 onwards.

By grouping three years of data together to provide larger samples, and looking at each skill separately, we can see how the results from the 2011 Census and from the APS in 2010-12 compare with 2016-18 data.

Chart 13: Understanding spoken Welsh, speaking, reading, and writing, by age, source and years 2018
Chart 13 shows us that the APS data for being able to understand, speak, read and write follows a similar trend to that of the Census, albeit at a higher level. As for Chart 4, the difference between the Census and the APS results is at its greatest for those of school age.

When comparing the APS results for 2016-18 with the APS results from 2010-12, we can clearly see that for children, the proportion who are able to understand, speak, read and write are higher in 2016-18 than they were for 2010-12, the difference is less noticeable for adults.

Chapter 3: Frequency of speaking Welsh

Unlike the Census, the APS also includes a question on how often Welsh speakers speak the language, from daily, weekly, less often to never. In the year to December 2018 17% said they spoke Welsh daily (this equates to 499,900 people, or 56% of Welsh speakers), 5% said that they spoke Welsh weekly, 7% less often than weekly and 2% said that they never speak Welsh (with the remaining 70% not able to speak Welsh) Chart 14 shows how these have changed since the question was introduced in 2007

Our preferred source of data on the use of the Welsh language are the Welsh Language Use Surveys, a series of one-off surveys. This includes a range of questions on Welsh speakers’ use of the language which allows the data to be interpreted in more detail. In the last surveys in 2013-15, 12% of the population reported that they spoke Welsh daily, slightly lower than the APS estimates for the same period. Again, it is unclear why the figures in the APS show significantly higher levels of self-reporting than other sources.

Chart 14: How often do you speak Welsh 2007 - 2018

Chart 14 shows that since 2007, there has been a steady increase in the percentage of people who speak Welsh daily from 13% (387,800) in 2007 to 17% (499,900) in 2018, while the proportion who speak it less often than daily have only seen a very slight increase.

Females were more likely to speak Welsh on a daily basis (18%) than males (15%)
The frequency of speaking Welsh varies significantly by age as shown in chart 15.

Chart 15: How often do you speak Welsh by age, 2018

Chart 15 shows that children are far more likely to report speaking Welsh daily than adults, which is likely to be driven by their exposure to Welsh through education. Despite those aged 12 to 15 years old being the most likely to report they speak Welsh, it is those aged 8 to 11 years old who are most likely to speak Welsh on a daily basis. 4% of those aged 16 to 19 report that they can speak Welsh but never do.
The frequency of speaking Welsh also varies by local authority area, as shown in Chart 16.

Chart 16: How often do you speak Welsh by local authority, 2018

As shown in Chart 16, the local authorities with the highest percentage of Welsh speakers are also the authority areas with the highest percentage of people speaking Welsh daily. However, this is not an even distribution amongst Welsh speakers. 84% of Welsh speakers in Gwynedd speak Welsh daily compared with 31% of Welsh speakers in Bridgend. Cardiff has a slightly higher percentage of ‘daily’ Welsh speakers than might be expected given the percentage of people who can speak Welsh in Cardiff (12% of the population in Cardiff speak Welsh daily, which equates to 51% of the Welsh speakers in Cardiff). This could be due to the greater number and density of Welsh speakers in Cardiff.

Although at a slightly higher level, the distribution of language use for local authorities shown in Chart 16 above is similar to the distributions found in the Welsh Language Use Survey in 2013-15.
With the exception of Rhondda Cynon Taf, all other local authority areas have seen a small increase in the proportion of people who speak Welsh daily since 2007 (Rhondda Cynon Taf has not changed). Ceredigion and Pembrokeshire have seen larger than average increases. In 2007, 37% of people in Ceredigion reported that they spoke Welsh daily. By 2018, this was 48%. In Pembrokeshire, 10% reported that they spoke Welsh daily in 2007; this has increased to 16% by 2018.

**Chart 17: Speaking Welsh daily in 2007 and 2018 by local authority**
Chapter 4: Why do the Census and the APS results differ?

The wording of the question about Welsh language ability included in the APS is almost identical to that included in the Census, however there are a number of differences between the sources, which could explain why their results differ.

- The census is a statutory self-completion questionnaire, and the APS is a voluntary survey which is mainly conducted by face-to-face interviews\(^2\).

- The census question asks respondents to tick ‘as many boxes as applies’; not everyone will read this instruction and may tick only one box. However, in an interviewer-led survey, the interviewer will ask about each skill separately, therefore increasing the possibility for people to say they do have some ability in Welsh.

- When respondents are faced with only one question, in an official statutory survey, they must make a categorical decision about whether they speak Welsh or not. Where an interviewer is present, the respondent may feel more able to describe their ability levels in more detail with the interviewer, and the interviewer may encourage respondents to say that they are able to speak Welsh so that they can provide more details about their ability in the subsequent questions.

- The presence of an interviewer could also introduce some social desirability effect, where the respondent wants to give the most desirable answer. This could be further inflated in the APS by having the question on ability to speak Welsh immediately after a question on national identity. The Census had a question on ethnicity between the two.

- In the APS, respondents are asked to respond on behalf of other household members. We found that when these ‘proxy’ responses are removed, the proportion who report being able to speak Welsh is slightly lower, particularly so for younger respondents aged 16-24, suggesting that fellow household members may overestimate other household members’ ability in Welsh. The Census also allows proxy responses, but as it is a self-completion questionnaire, there is more time to consult with other household members about the response they’d like to give.

- It should also be borne in mind that speakers’ assessment of how well they speak a language can be quite subjective. For some people, the ability to say a few words in the language is enough for them to say that they speak it. Others, despite speaking it regularly, may say that they can’t speak it if they feel that they are more comfortable speaking another language.

For these reasons, some respondents recorded as speaking Welsh in the Annual Population Survey might have reported that they were not Welsh speaking when completing the Census questionnaire.

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\(^2\) Having made initial contact with respondents they can also conduct the interviews over the telephone.
Summary of our findings

Can we use the APS results to assess the number of Welsh speakers?

The issues highlighted in this statistical bulletin highlight the issues around the subjective nature of self-assessment of language ability and what this means when counting the numbers of Welsh speakers. We have been aware for some time that there is a greater tendency for survey respondents to say they speak Welsh than in the Census, but we can only speculate about the possible reasons for this.

We are clear that the APS results should not be used to measure progress towards the target of a million Welsh speakers, however the results can be used as a useful indicator of potential trends, which should be used in conjunction with other data.

What do other surveys tell us?

The National Survey for Wales has also tended to have a higher percentage of Welsh speakers than the Census. The most recent National Survey results (2017-18), published on 20 June 2018, showed that 19% of the population aged 16 or over were able to speak Welsh, with an additional 12% stating that they had ‘some Welsh speaking ability’.

These results reflect a similar trend to that seen in the Welsh Language Use Survey 2013-15 – that is, an increasing percentage of people reporting that they have ‘some Welsh speaking ability’ (possibly amounting to just a little Welsh).

What can we conclude about the number of Welsh speakers?

There does seem to be an increasing trend in the numbers reporting that they speak Welsh in surveys, both in the APS and for those reporting to have ‘some Welsh language ability’ in the National Survey. We need to understand whether the trend observed for those aged 3 to 15 is due to a real change in Welsh speaking ability, or a greater tendency for parents to report that their children are able to speak Welsh.

We will have to wait for the results of the 2021 Census to measure the progress towards the target of a million Welsh speakers.
Key quality information

Background
The Annual Population Survey (APS) is carried out by the Office for National Statistics. It is a large scale continuous household survey, involving approximately 320,000 respondents across the UK. The topics covered include employment and unemployment, as well as housing, ethnicity, religion, health and education. The data is available at a quarterly basis.

The results reported in this bulletin are based on interviews completed in Wales from January 2001 to December 2018. In Wales approximately 35,000 respondents participated in the survey each year.

More information on how the survey was carried out, as well as more detailed information on the quality of the survey can be found on the ONS website

Interpreting the results
Percentages quoted in this bulletin are based on only those respondents who provided an answer to the question. ‘Don’t know’ and ‘Refused’ responses have been removed. The results are weighted to ensure that the results reflect the age and sex distribution of the Welsh population.

Despite having a very large sample size, the estimates from the Annual Population Survey are subject to a margin of uncertainty. Part of the uncertainty comes from the fact that any randomly-selected sample of the population will give slightly different results from the results that would be obtained if the whole population was surveyed. This is known as sampling error. Confidence intervals can be used as a guide to the size of the sampling error. The table below gives 95% confidence intervals for the proportion who speak Welsh by age groups and local authority as a guide for the precision of the results in his bulletin.

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<th>Local Authority</th>
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</tbody>
</table>

These intervals are calculated around a survey estimate and give a range within which the true value is likely to fall. In 95% of survey samples, the 95% confidence interval will contain the ‘true’ figure for the whole population (that is, the figure we would get if the survey covered the entire population). In general, the smaller the sample size the wider the confidence interval.

As with any survey, the Annual Population Survey is also subject to a range of other sources of error: for example, due to non-response; because respondents may not interpret the questions as intended or may not answer accurately; and because errors may be introduced as the survey data is processed. These kinds of error are known as non-sampling error.
National Statistics status

The United Kingdom Statistics Authority has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the Code of Practice for Statistics.

National Statistics status means that official statistics meet the highest standards of trustworthiness, quality and public value.

All official statistics should comply with all aspects of the Code of Practice for Statistics. They are awarded National Statistics status following an assessment by the UK Statistics Authority’s regulatory arm. The Authority considers whether the statistics meet the highest standards of Code compliance, including the value they add to public decisions and debate.

It is Welsh Government’s responsibility to maintain compliance with the standards expected of National Statistics. If we become concerned about whether these statistics are still meeting the appropriate standards, we will discuss any concerns with the Authority promptly. National Statistics status can be removed at any point when the highest standards are not maintained, and reinstated when standards are restored.

Well-being of Future Generations Act (WFG)

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10)(1) of the Act, the Welsh Ministers must (a) publish indicators (“national indicators”) that must be applied for the purpose of measuring progress towards the achievement of the Well-being goals, and (b) lay a copy of the national indicators before the National Assembly. The 46 national indicators were laid in March 2016.

Information on the indicators, along with narratives for each of the well-being goals and associated technical information is available in the Well-being of Wales report.

The APS is not used for the National indicators on the Welsh language, however this release presents some contextual information for the two national indicators which relate to the Welsh language. These are the percentage of people who:

- **Speak Welsh daily and can speak more than just a few words of Welsh** (No 36),
- **Can speak Welsh** (No 37)


The statistics included in this release could also provide supporting narrative to the national indicators and be used by public services boards in relation to their local well-being assessments and local well-being plans.
Further details

This bulletin is available at:

Next update

Not a regular output

We want your feedback

We welcome any feedback on any aspect of these statistics which can be provided by email to WelshLanguageData@gov.wales

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