

Irish in Business – Survey Update

June 2007

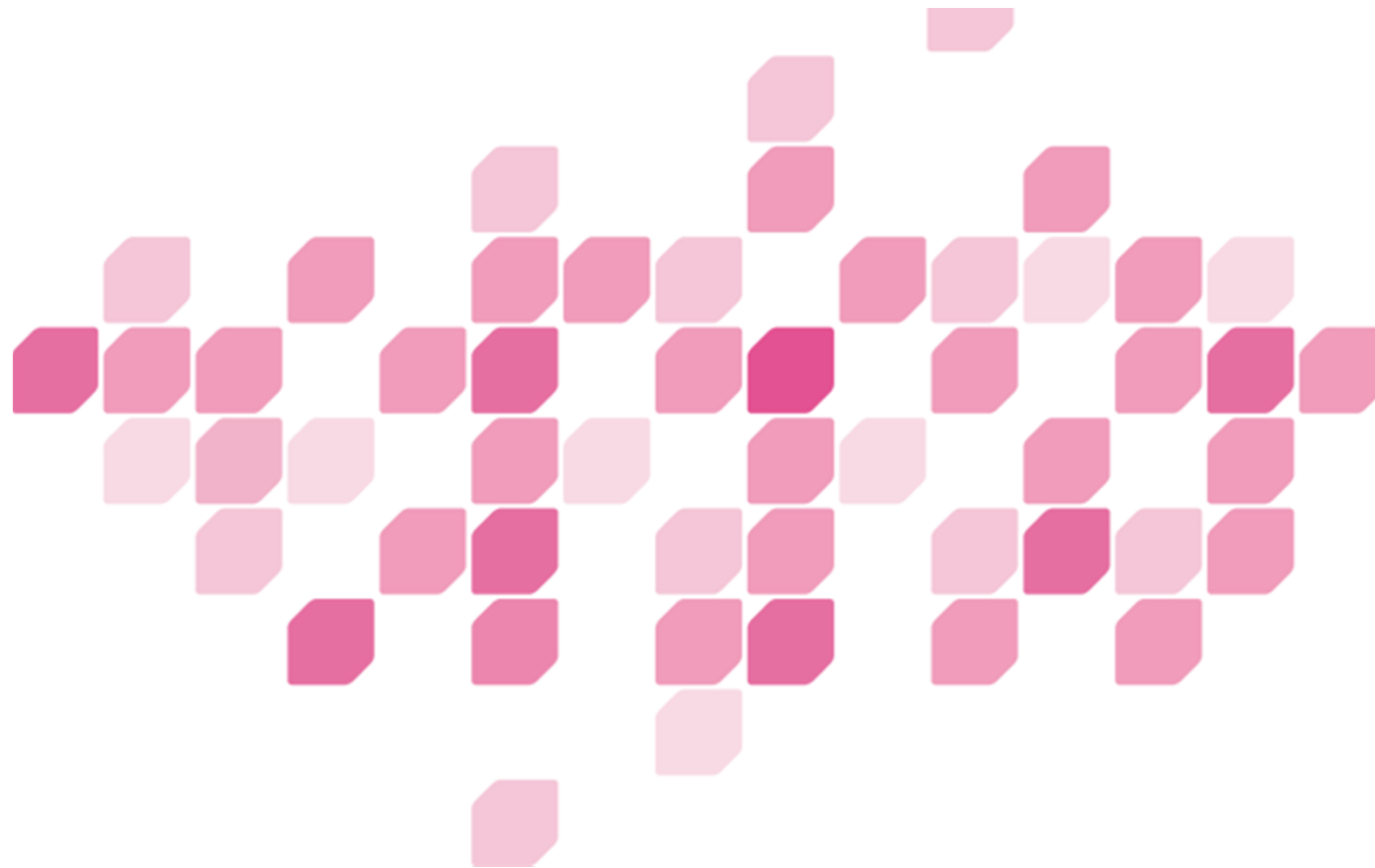


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Introduction

Background & Methodology

- Foras na Gaeilge is the body responsible for the promotion of the Irish language throughout the Island of Ireland.
- As part of its advisory capacity, Foras na Gaeilge commissioned TNS mrbi to update public reaction to the increased use of Irish by businesses.
- Omnibus research was used to access a robust, nationally representative sample of adults in both the Republic and Northern Ireland and allow comparisons over time.
- All interviews were conducted by telephone and respondents were selected for interview using RDD (Random Digit Dialling).
- The survey findings were weighted to reflect the most comparable census data for each region i.e. the 2001 Northern Ireland Census and the 2002 Census in the Republic.

Background & Methodology

- Details of fieldwork for each phase of the research is as follows:

Wave 1	RoI	NI
Fieldwork	20 th – 29 th Sept 2005	16 th – 21 st Sept 2005
Sample size	1,026	500
Description	All adults 15+	All adults 16+
Wave 2	RoI	NI
Fieldwork	1 st – 11 th May 2007	10 th – 14 th May 2007
Sample size	1,012	500
Description	All adults 15+	All adults 16+

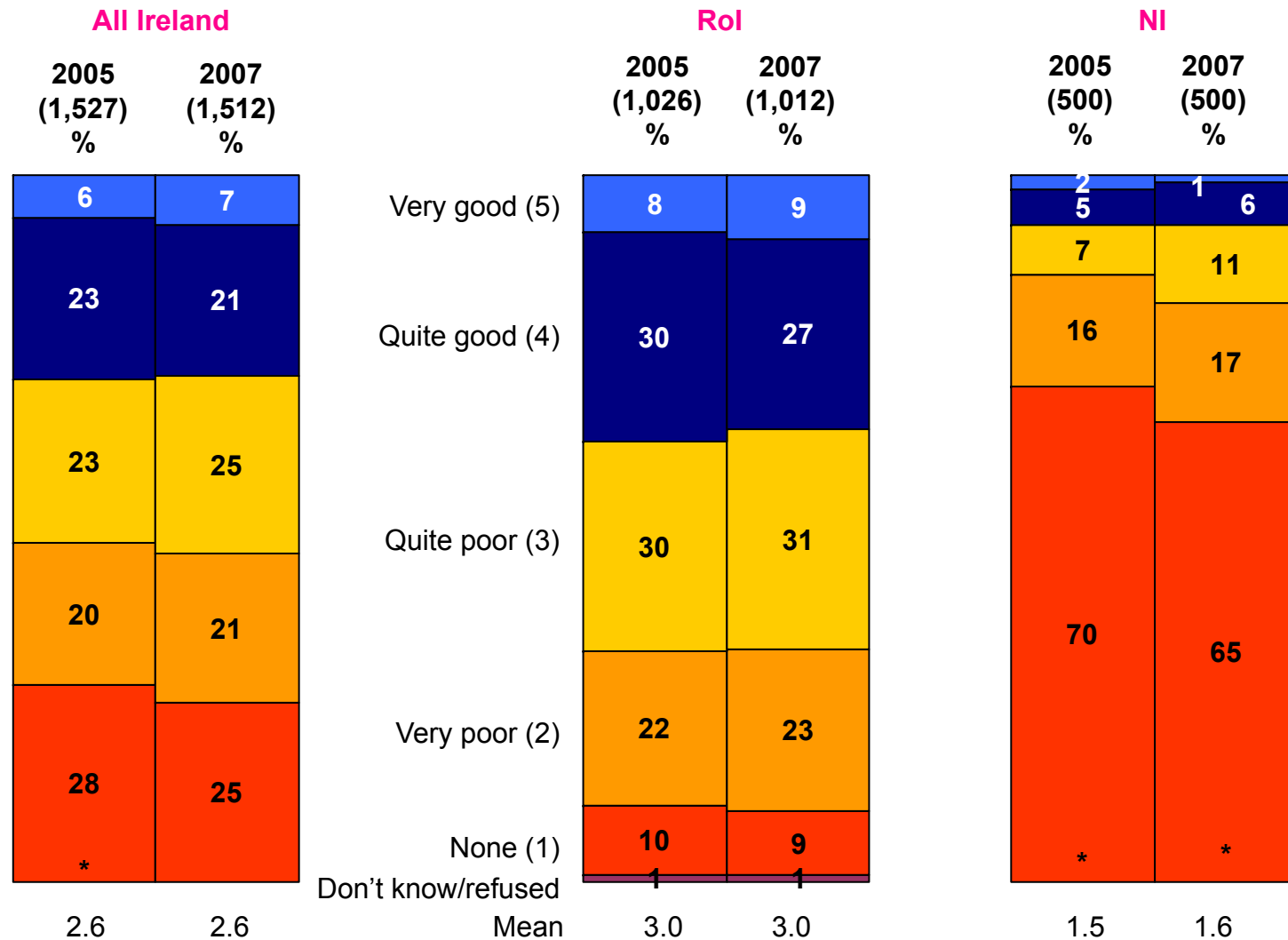
Population Profiles '000's

	Roi		NI	
	3,090	100%	1,287	100%
Male	1,522	49%	617	48%
Female	1,568	51%	670	52%
U.24	642	21%	211	16%
25-34	617	20%	242	19%
35-44	563	18%	247	19%
45-54	480	16%	201	16%
55+	788	25%	380	30%
AB	374	12%	195	15%
C1	1,034	34%	450	35%
C2	653	21%	292	23%
DE	755	24%	350	27%
F	274	9%	n/a	n/a
Capital	887	29%	217	17%
Ex-Capital	2,203	71%	1,070	83%

Findings

Description Of Level Of Irish

Base: All Respondents



Profile Of Irish Speakers

- There are some fluctuations in the profiles of those who claim to speak Irish with varying proficiency, although this is more likely to be due to the relatively small base sizes rather than any real shift in the composition of speaker profiles.
- One third of those who claim to have very good Irish in the Republic continue to be under 24 years/live in Munster.
- Those who claim to have very poor Irish in the Republic continues to be skewed to those from a C2 background (skilled working class), but now shows a greater proportion of C1's (white collar workers).
- Those with a very good/good Irish language ability in the North still have the greatest representation amongst the younger age cohorts and those living outside Belfast.

Profile Of Irish Speakers

2007 Speaker Profiles Vs. Population Profiles
Pink = Sig @ 99% level
Grey = Sig @ 95% level
↑↓ = Sig difference in profiles 2005 vs. 2007

RoI 2007	NI 2007		Very/Quite Good						Quite Poor			
			RoI Very Good		RoI Quite good		NI V./quite good		RoI		NI	
			2005	2007	2005	2007	2005	2007	2005	2007	2005	2007
(1,012)	(500)	Base	(75)*	(88)*	(294)	(277)	(32)*	(30)*	(309)	(316)	(35)*	(52)*
			%	%	%	%	%	%	%	%	%	%
49	48	Male	47	41	49	48	53	45	48	49	47	48
51	52	Female	53	59	51	52	47	54	52	51	53	52
21	16	U.24	43	36	29	<u>24</u> ↓	35	38	16	22↑	20	<u>23</u>
20	19	25-34	14	17	17	20	27	33	23	21	20	25
18	19	35-44	7	10	17	19	10	19	20	17	12	18
16	16	45-54	14	8	13	14	18	10	15	15	23	18
25	30	55+	22	28	24	23	10	13	25	25	24	16
12	15	AB	18	19	13	<u>15</u>	12	<u>22</u>	14	11	19	<u>21</u>
34	35	C1	35	44	36	31	32	43	34	<u>31</u>	29	32
21	23	C2	14	15	21	21	21	14	22	20	31	29
24	27	DE	20	17	22	23	37	21 ↓	19	<u>27</u> ↑	21	18
9	-	F	13	<u>6</u> ↓	8	10	-	-	11	11	-	-
29	-	Dublin	29	27	28	29	-	-	25	25	-	-
26	-	RoL	19	22	24	<u>23</u>	-	-	27	26	-	-
26	-	Munster	37	35	33	28	-	-	25	26	-	-
20	-	Conn/Ulster	14	16	15	20↑	-	-	23	<u>23</u>	-	-
-	17	Belfast	-	-	-	-	3	13↑	-	-	16	12
-	83	Ex-Belfast	-	-	-	-	98	87↓	-	-	84	87

*Caution small base

Profile Of Irish Speakers

2007 Speaker Profiles Vs. Population Profiles
Pink = Sig @ 99% level
Grey = Sig @ 95% level
↑↓ = Sig difference in profiles 2005 vs. 2007

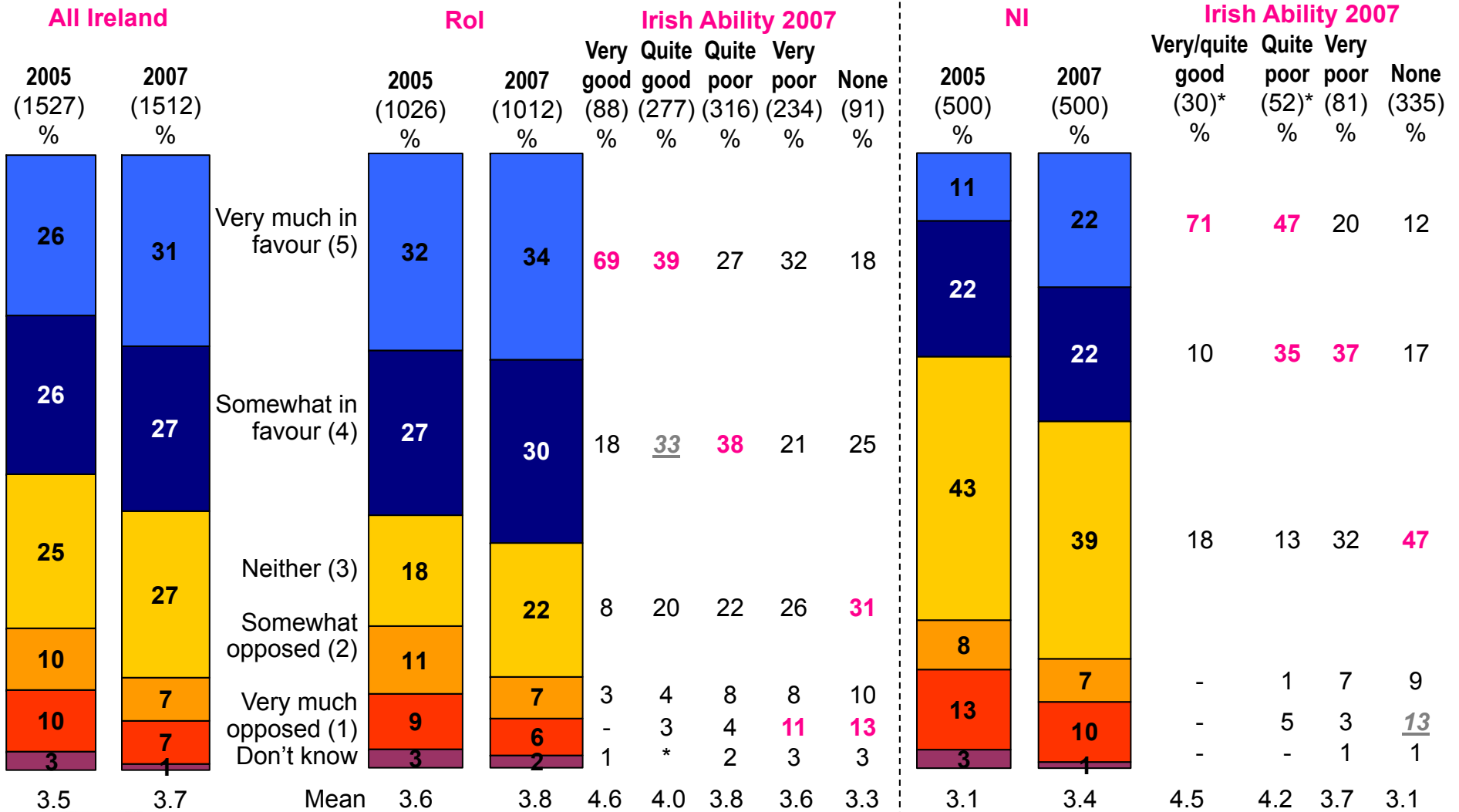
RoI 2007	NI 2007		Very Poor				None			
			RoI		NI		RoI		NI	
			2005	2007	2005	2007	2005	2007	2005	2007
(1012)	(500)	Base	(234)	(234)	(76)*	(81)*	(107)	(91)	(356)	(335)
			%	%	%	%	%	%	%	%
49	48	Male	53	51	58	60	46	58↑	45	45
51	52	Female	47	49	42	40	54	42	55	55
21	16	U.24	13	13	21	16	12	14	13	13
20	19	25-34	20	19	23	21	25	24	17	16
18	19	35-44	21	22	20	<u>25</u>	19	17	21	18
16	16	45-54	21	18	13	13	15	22	15	17
25	30	55+	26	27	23	25	30	24	34	<u>35</u>
12	15	AB	9	10	15	12	5	<u>8</u>	15	14
34	35	C1	29	35↑	39	36	35	36	35	34
21	23	C2	20	25	25	<u>31</u>	25	21	22	20
24	27	DE	34	23↓	21	22	30	31	28	31
9	-	F	8	8	-	-	5	3	-	-
29	-	Dublin	33	31	-	-	32	<u>35</u>	-	-
26	-	RoL	29	32	-	-	18	<u>21</u>	-	-
26	-	Munster	24	21	-	-	25	25	-	-
20	-	Conn/Ulster	14	16	-	-	26	18↓	-	-
-	17	Belfast	-	-	15	<u>24</u>	-	-	19	16
-	83	Ex-Belfast	-	-	85	76	-	-	81	84

*Caution small base

Favourability Towards Increased Visibility Of Irish In Advertising & Marketing

Base: All Respondents

2007 Ability Vs. 2007 Totals
Pink = Sig @ 99% level
Grey = Sig @ 95% level

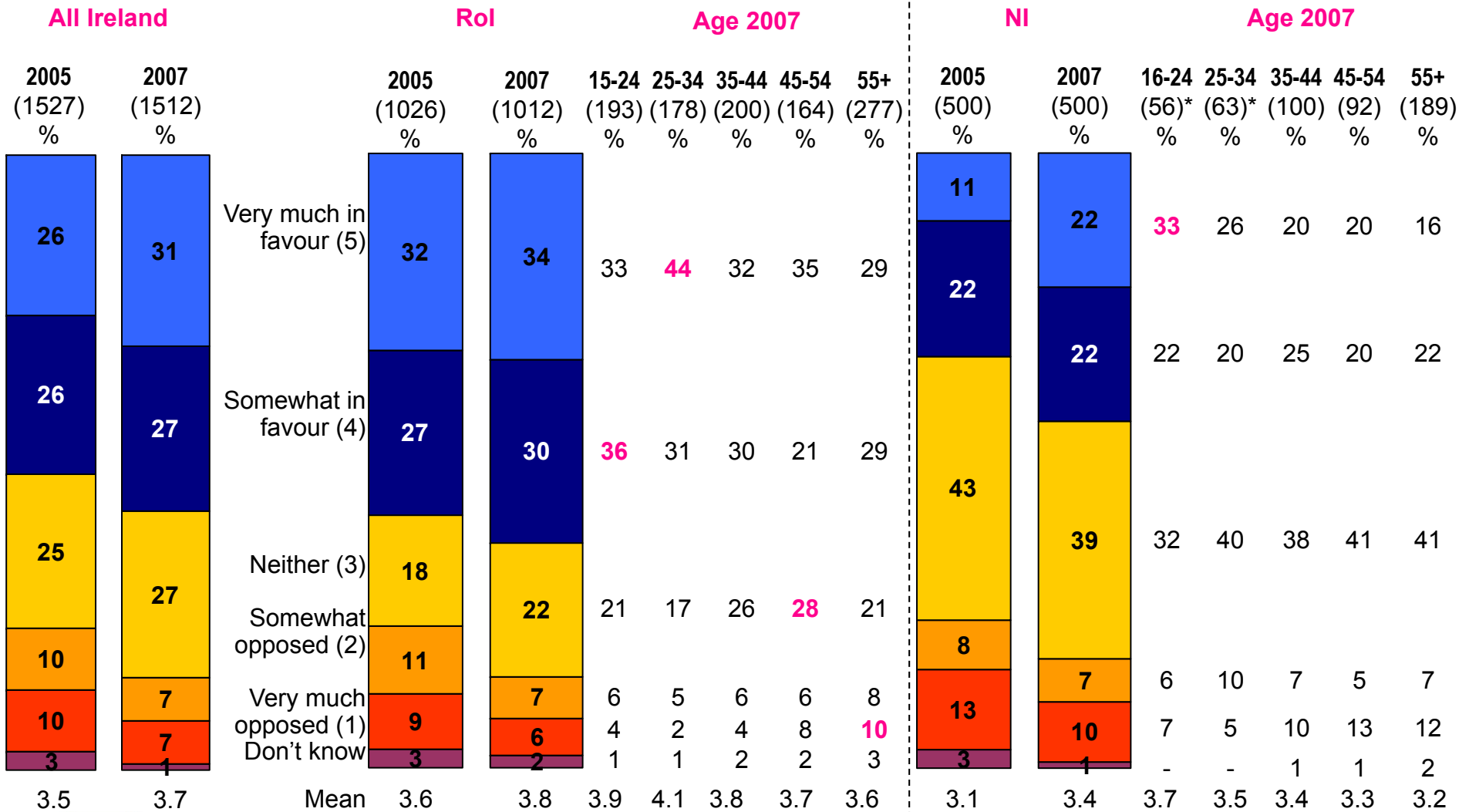


*Caution small base

Favourability Towards Increased Visibility Of Irish In Advertising & Marketing X Age

Base: All Respondents

2007 Age Vs. 2007 Totals
Pink = Sig @ 99% level
Grey = Sig @ 95% level

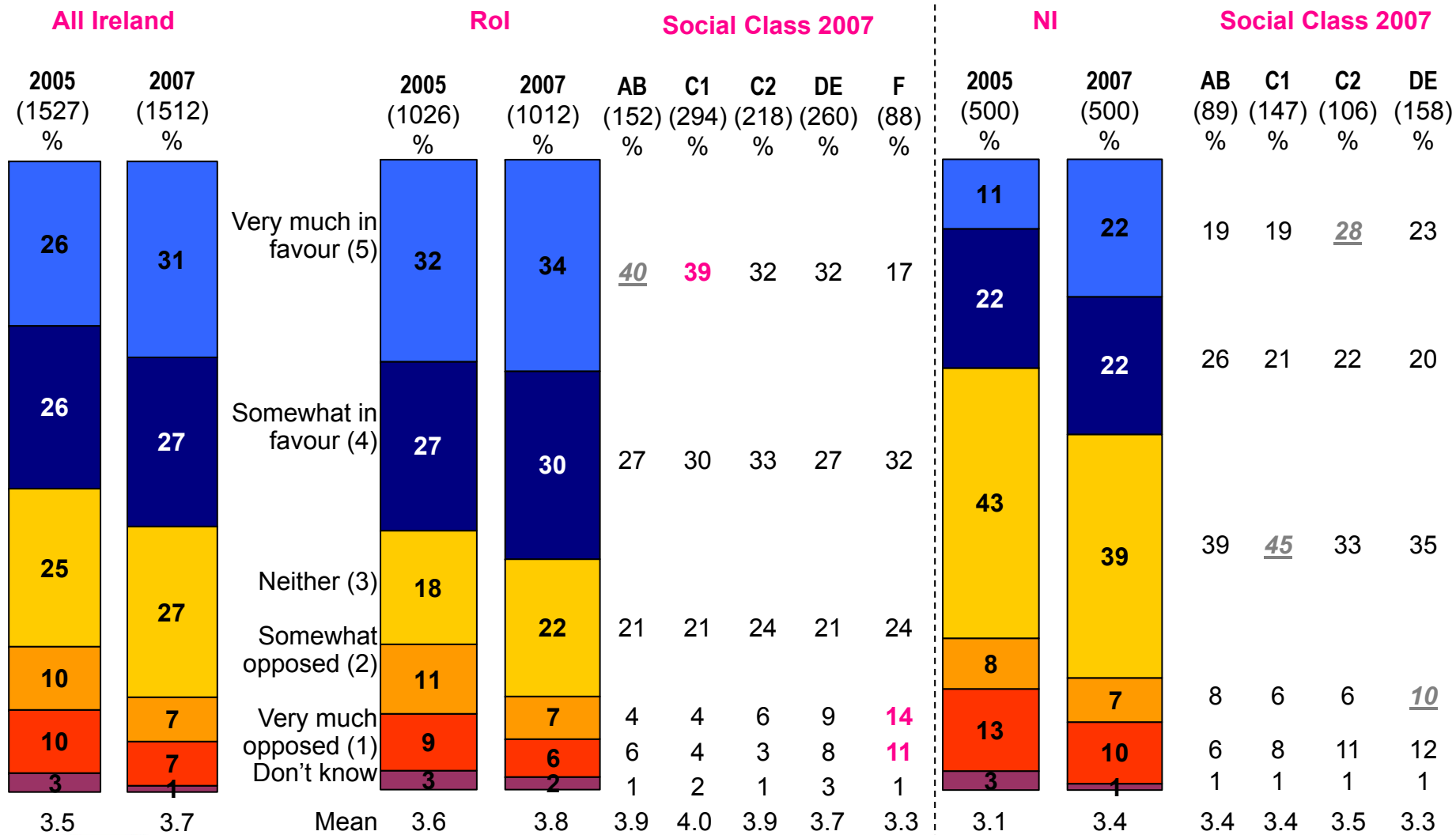


*Caution small base

Favourability Towards Increased Visibility Of Irish In Advertising & Marketing X Social Class

Base: All Respondents

2007 Class Vs. 2007 Totals
 Pink = Sig @ 99% level
 Grey = Sig @ 95% level



Profile Of Those In Favour/Opposed To Increased Visibility Of Irish In Advertising & Marketing

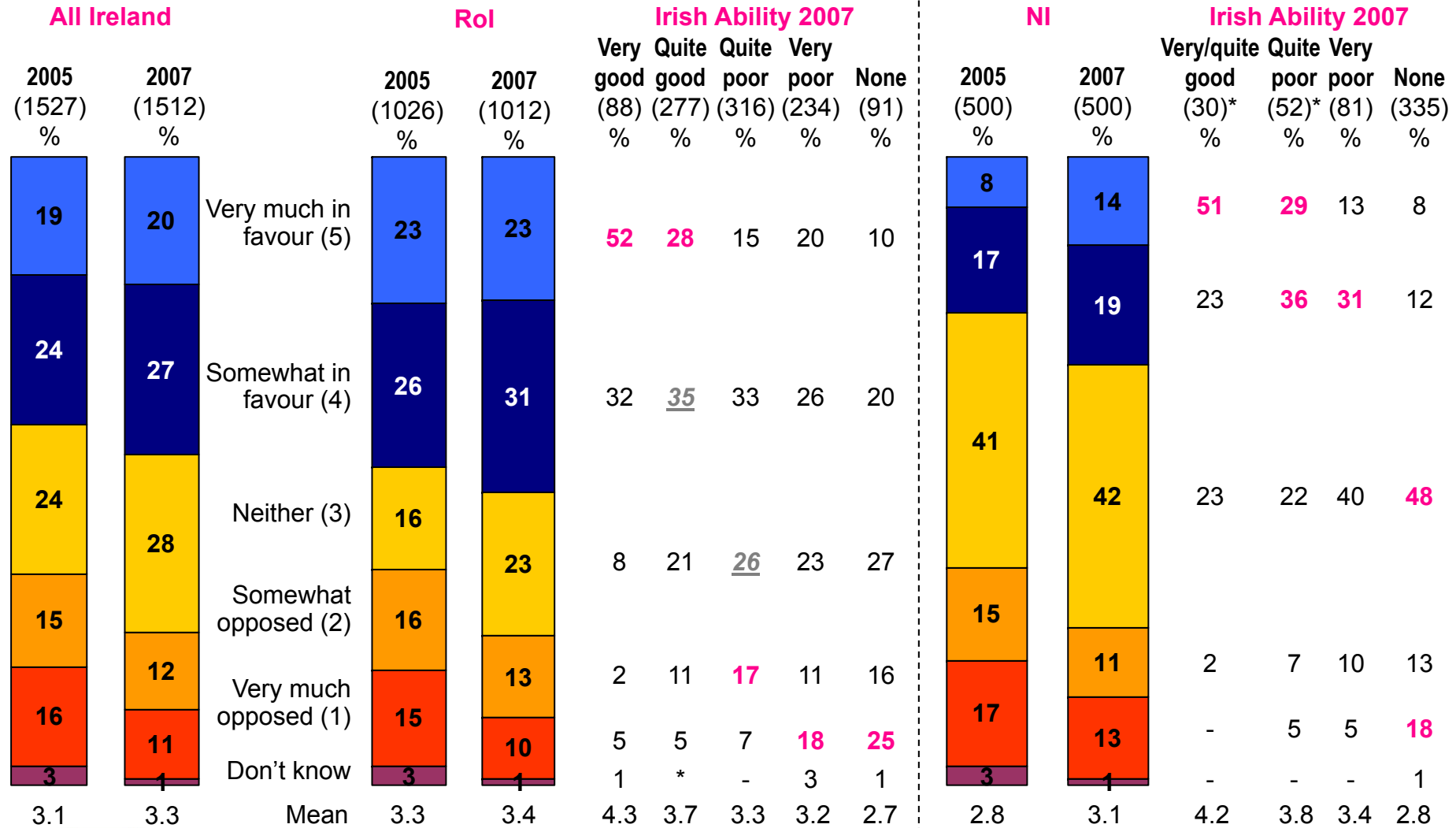
2007 Favourability Profiles Vs. Pop. Profiles
Pink = Sig @ 99% level
Grey = Sig @ 95% level
↑↓ = Sig difference in profiles 2005 vs. 2007

	RoI							NI						
	RoI Pop.	Any In Favour		Neither		Any Opposed		NI Pop.	Any In Favour		Neither		Any Opposed	
	2007 (1012) %	2005 (587) %	2007 (642) %	2005 (184) %	2007 (226) %	2005 (226) %	2007 (126) %	2007 (500) %	2005 (156) %	2007 (211) %	2005 (216) %	2007 (196) %	2005 (113) %	2007 (88) %
Base														
Male	49	45	48	60	50↓	51	53	48	49	49	49	45	45	51
Female	51	55	52	40	50↑	49	47	52	51	50	51	55	55	49
U.24	21	25	22	18	20	13	<u>17</u>	16	22	21	14	14	11	13
25-34	20	23	23	20	15	14	13	19	23	20	18	19	15	17
35-44	18	17	18	21	<u>21</u>	18	15	19	20	20	20	19	19	19
45-54	16	13	14	18	20	22	18	16	12	14	19	17	15	17
55+	25	22	23	23	24	34	38	30	24	<u>26</u>	30	31	40	35
AB	12	12	13	12	11	12	10	15	12	16	16	15	19	13
C1	34	35	36	36	32	29	22↓	35	34	<u>31</u>	37	41	35	<u>29</u>
C2	21	20	22	23	23	22	15↓	23	23	26	25	<u>19↓</u>	17	23
DE	24	23	23	24	24	27	34↑	27	32	27	22	24	28	<u>34</u>
F	9	9	7	6	10↑	9	18↑	-	-	-	-	-	-	-
Very/quite good Irish	36	46	43	28	28	23	18	7	16	13	4	3	1	-
Quite poor Irish	31	29	31	30	32	30	30	11	15	21↑	3	4	3	4
Very poor Irish	23	18	19	25	<u>27</u>	30	35	17	23	22	14	14	8	10
None	9	6	6	16	13	15	17	65	46	43	79	79	88	86

Favourability Towards Increased Use Of Irish By Businesses

Base: All Respondents

2007 Ability Vs. 2007 Total
Pink = Sig @ 99% level
Grey = Sig @ 95% level

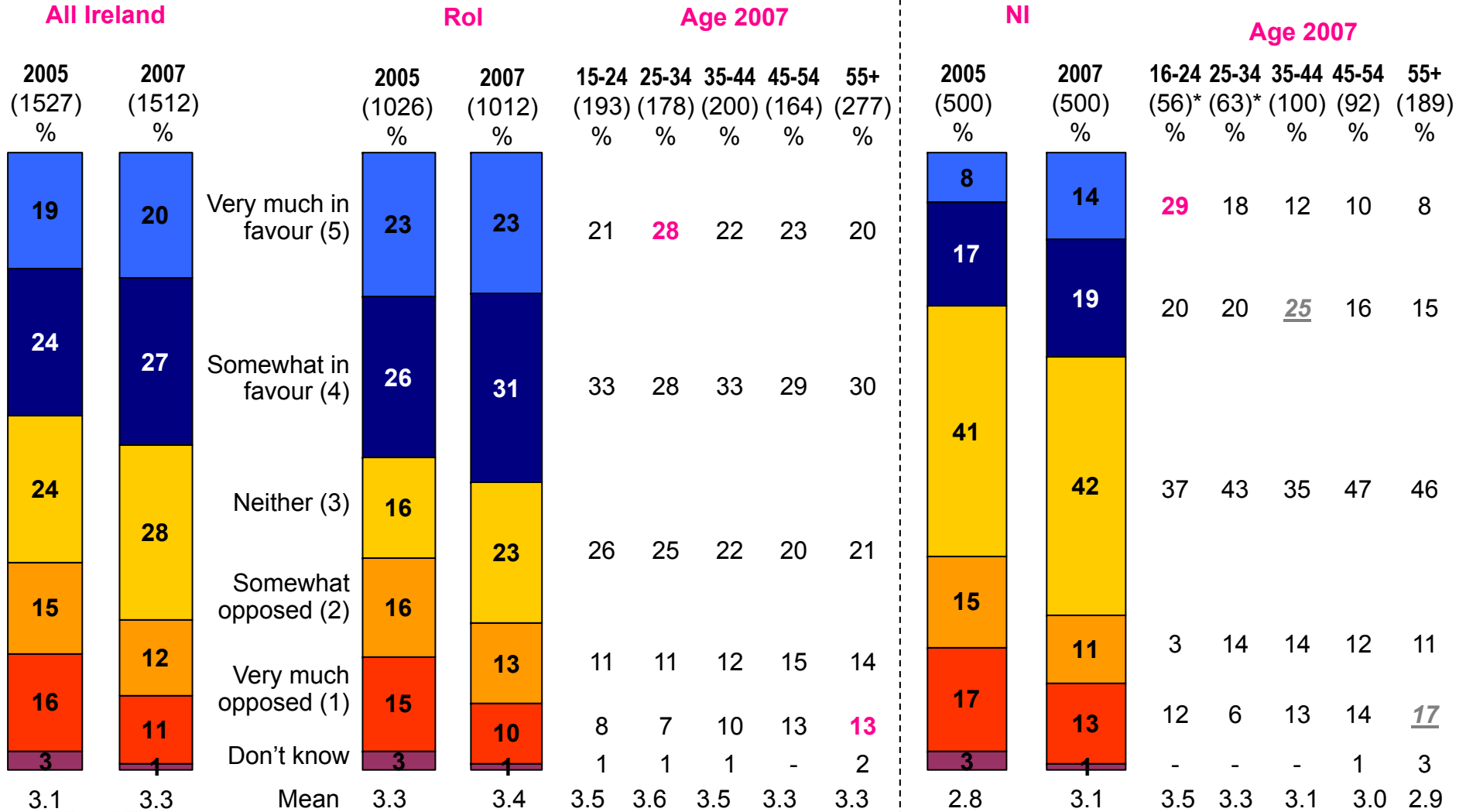


*Caution small base

Favourability Towards Increased Use Of Irish By Businesses X Age

Base: All Respondents

2007 Age Vs. 2007 Total
Pink = Sig @ 99% level
Grey = Sig @ 95% level

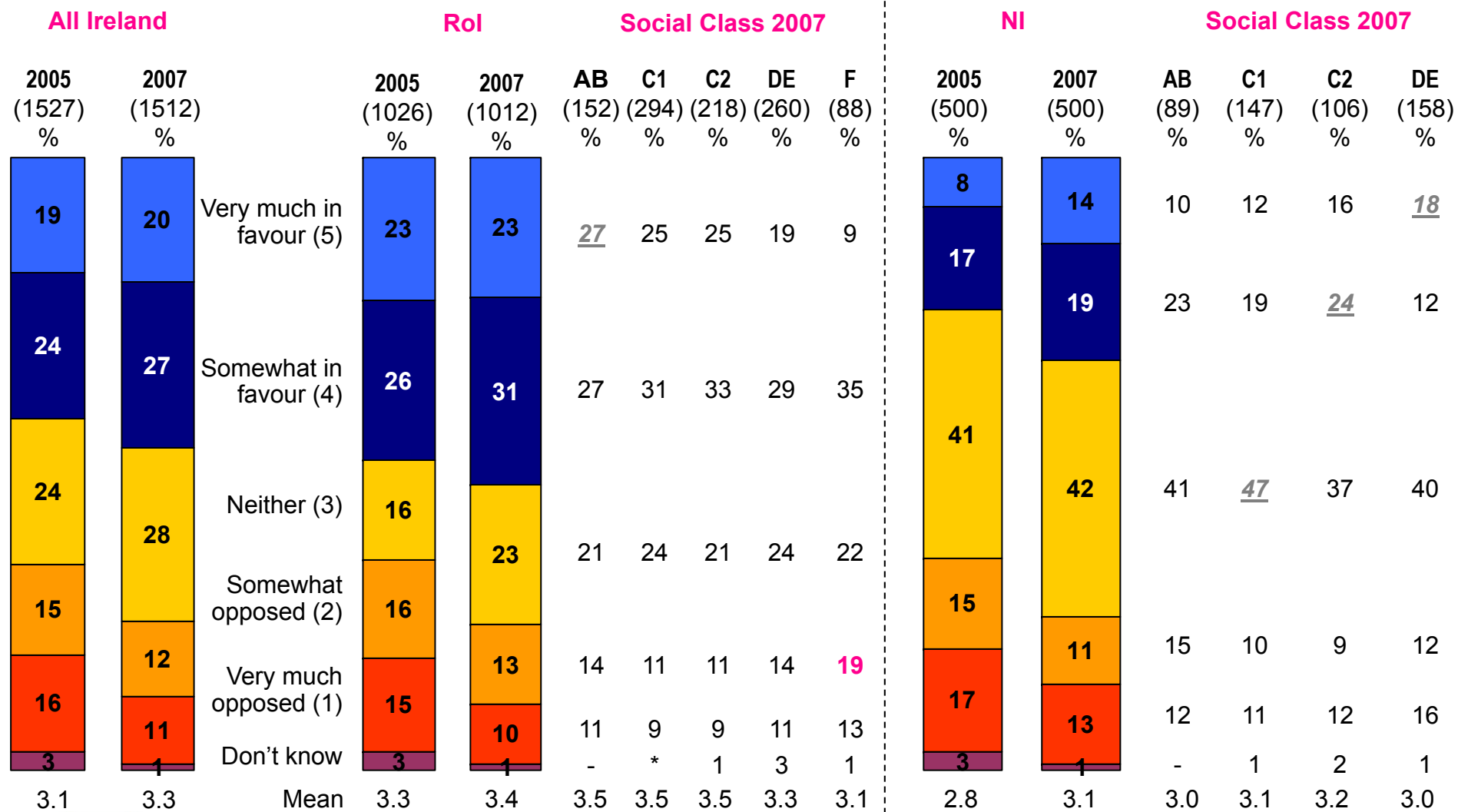


*Caution small base

Favourability Towards Increased Use Of Irish By Businesses X Social Class

Base: All Respondents

2007 Class Vs. 2007 Totals
 Pink = Sig @ 99% level
 Grey = Sig @ 95% level



Profile Of Those In Favour/Opposed To Increased Use Of Irish By Businesses

Favourability Profiles Vs. Pop. Profiles
Pink = Sig @ 99% level
Grey = Sig @ 95% level
 ↑↓ = Sig difference in profiles 2005 vs. 2007

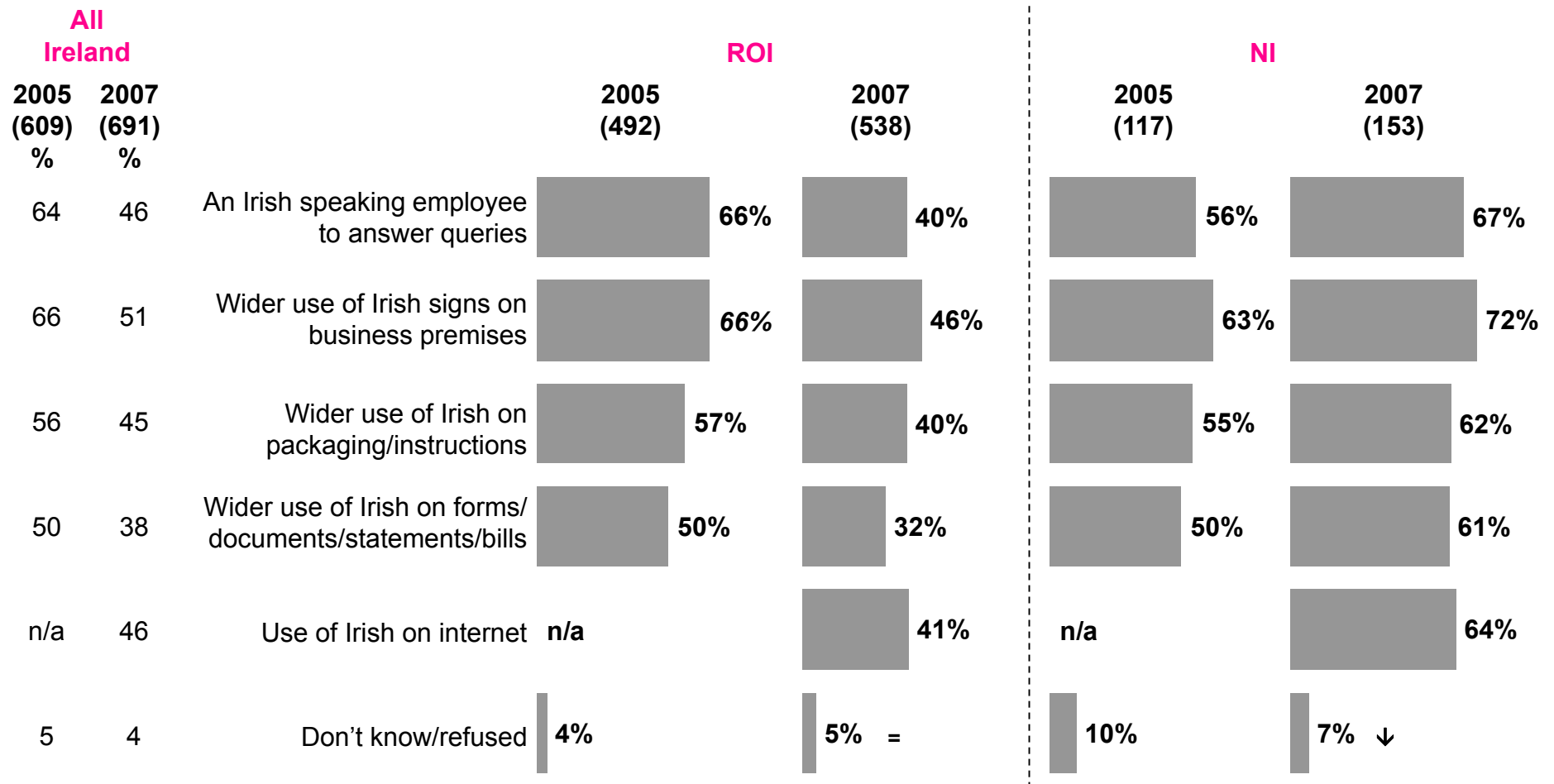
	RoI							NI						
	Rol Pop. 2007	Any In Favour		Neither		Any Opposed		NI Pop. 2007	Any In Favour		Neither		Any Opposed	
	(1012)	2005	2007	2005	2007	2005	2007	(500)	2005	2007	2005	2007	2005	2007
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Base	(1012)	(492)	(538)	(171)	(227)	(333)	(238)	(500)	(117)	(153)	(205)	(213)	(163)	(128)
Male	49	48	47	51	50	51	<u>53</u>	48	47	52	51	44	44	50
Female	51	52	53	49	50	49	47	52	53	48	49	56	56	50
U.24	21	24	21	22	<u>24</u>	15	<u>17</u>	16	18	<u>24</u>	17	14	14	<u>10</u>
25-34	20	23	21	14	22↑	19	<u>16</u>	19	25	21	16	19	16	16
35-44	18	16	19	25	17↓	19	18	19	20	22	20	16	18	22
45-54	16	13	15	17	<u>13</u>	18	<u>19</u>	16	16	<u>12</u>	17	18	13	17
55+	25	24	24	22	24	29	<u>30</u>	30	21	<u>21</u>	30	32	39	<u>35</u>
AB	12	12	12	14	11	11	13	15	13	15	16	15	17	17
C1	34	36	35	32	35	33	<u>29</u>	35	33	33	39	39	32	<u>30</u>
C2	21	21	23	19	20	23	19	23	26	<u>27</u>	22	20	22	20
DE	24	22	22	26	25	25	<u>27</u>	27	27	25	24	26	29	<u>32</u>
F	9	9	7	9	9	8	<u>12</u> ↑	-	-	-	-	-	-	-
Very/quite good Irish	36	49	<u>46</u>	36	<u>28</u> ↓	22	<u>21</u>	7	17	<u>16</u>	5	4	3	1
Quite poor Irish	31	29	29	30	<u>37</u> ↑	32	33	7	14	<u>22</u> ↑	6	6	3	6
Very poor Irish	23	17	20	20	23	29	<u>29</u>	16	20	<u>22</u>	16	16	12	10
None	9	5	7	12	11	17	<u>17</u>	70	48	<u>39</u> ↓	73	<u>74</u>	83	<u>83</u>

Favourability Profiles

- Whilst positive support for the increased visibility of Irish in advertising & marketing remains largely the same, the current research suggests there is considerably reduced opposition to the proposition across all demographics.
- Once again support is correlated to Irish language ability, i.e. strongest amongst those who are proficient in the language and weakest amongst those who are not – but this relationship is not exclusive!
- In the Republic, approaching 1 in 4 (35%) of those who favour the increased use of Irish in advertising and marketing have very poor/no Irish ability.
- Roughly half of those opposed to the proposition are aged 45+ years – a level that is consistent on both sides of the border!
- Similar trends are apparent in terms of support for increased use of Irish by businesses.

Types Of Initiatives Would Like To See Introduced By Businesses?

Base: All In Favour Of Increased Use Of Irish By Businesses



Management Summary

Management Summary

Irish language Ability

- Approximately 1 in 10 adults in the Republic of Ireland claim to have very good Irish ability – a proportion very similar to that of previous surveys.
- In Northern Ireland, 65% of adults claim to have no Irish at all, a marginal decrease of five percentage points over the past 2 years.
- Those with no ability in the Irish language in RoI and in the North show a similar skew to those aged 45+ years. However, the previously apparent male bias is no longer evident in the Republic.

Management Summary

Increased Visibility in Advertising & Marketing

- In the Republic, there has been a slight increase in the proportion in favour (to any extent) of the increased visibility of Irish in advertising and marketing, up five percentage points. However, the level of increased support is more acute in the North, where over 4 in 10 (44%) are in favour of the proposition, up from 33% previously.
- In Northern Ireland, c. 4 in 10 are neither in favour nor opposed to the concept – a figure which may reflect the more modest Irish language ability in the region.
- Opposition to the increased use of Irish in advertising has decreased in both jurisdictions although the percentage decrease is different for both – 7% RoI, 4% NI.

Management Summary

Increased Use Of Irish By Businesses

- Support for the increased use of Irish by businesses in day-to-day dealings is recorded at slightly more modest levels than is evident for the increased use of Irish in advertising – 54% vs. 64% in the Republic - a trend that more pronounced in NI (33% vs. 44%) – but generally shows increased support in both jurisdictions.
- There is considerable support for the initiatives put to respondents on each side of the border amongst those who are in favour of the increased use of Irish by businesses.
- Naturally there continues to be a correlation between one's Irish language ability and support for the increased use of Irish i.e. those with the greatest ability register the highest levels of support, whilst those with lowest ability are least likely to be in favour of either proposition.

Recommendations & Conclusions

- As was seen in 2005, the increased use of Irish in advertising has slightly greater appeal than that of the increased use of Irish by businesses. From the perspective of those with limited/no language ability, it is less intimidating to engage in Irish in a passive manner, such as that afforded by advertising/marketing, than it is to transact with businesses through the medium of Irish.
- However, it is possible that the increased use of Irish in advertising will generate greater interest and confidence in using the language, thus making the incorporation of Irish into other business interfaces more acceptable and accepted in the future.
- It is encouraging to see increased support for a wider use of Irish in the North, given the vast majority of the population have no language ability.
- Whilst the current survey shows differences in the absolute levels of support for business initiatives, the broad trends remain similar in both regions i.e. widest support for use of Irish signage, relatively lower support for wider use of Irish in business documents.