# GOING IT ALONE:

# SELF-INSTRUCTION IN ADULT FOREIGN-LANGUAGE LEARNING

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*Od svih onih koji na 'dug put' se uputiše*

*Zar jedan se vrati tajne puta da opiše?*

*Zato na tvom putu, punom želje i nevolje,*

*Propuštaj ništa, jer nećeš se vratiti više!*


*Of those who on the Long Road have set out, pray,*

*Who has come back, the secrets of the road to say?*

*On thy road, thus, with trouble and desire strewn,*

*Miss nought, for thou wilst not come again this way!*


**written on the wall of the old caravanserai, Sarajevo**

*Aan mijn vrouw en zoon*
*en de burgers van Bosnië*
*medeburgers van Europa*


*Ženi i sinu*
*i gradjanima Bosne*
*sagradjanima Evrope*


*To my wife and son*
*and the citizens of Bosnia*
*fellow-citizens of Europe*

# Acknowledgements

# Abstract

This project looks at foreign-language self-instruction by adult native speakers of English.

A literature review surveys the self-instruction field, plus more general literature on second language acquisition, learner characteristics and strategies, and course design.

An initial pre-study presents a taxonomy of published teach-yourself package features, based on a survey of over 40 courses.

The second pre-study presents a learner-diary study of 11 months' self-instruction of Hungarian from post-beginner level by the researcher. Lexis and listening are revealed as the main challenges, and the importance of real-message practice is highlighted. A threshold is identified - corresponding to the ability to cope with authentic language - at which strategies change from coursebook-centred to real text- and interaction-centred.

In the main study, telephone interviews of 70 learners with self-instructed experience supplied reported-achievement profiles for all their languages, plus open-ended reports on their self-instructed learning processes. Multivariate statistics plus qualitative analysis of the interview protocols were used to identify patterns in the data. Mixed-means outperforms both self-instruction alone and classwork alone in terms of command, dropout and sense of success, with classwork→self-instruction as the best sequence. Higher proficiency in mixed/self-instruction-only mode is linked to better listening and speaking experiences, and to good management of learning. Learners with more self-instructed experience worry about initial listening and speaking problems less, and are more aware of writing. Learning style is the chief process factor seen as affecting self-instructed learning; others are general strategic skill, ability to tackle the lexico-grammar through writing, full-speed listening, "package-wiseness", exploitation of external motivational/affective factors, intensive reading/cassette-work skills, aptitude/discipline, and the ability to combine different learning resources.

The conclusion presents implications for second language acquisition, followed by recommendations for materials designers, self-instructed learners, language centres and learner training programmes.

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# CHAPTER 1

# INTRODUCTION

# 1.1 Explorations

## 1.1.1 The curious case of teach-yourself

This project explores foreign-language self-instruction - i.e. starting or brushing up a language without a teacher - by native English-speaking adults. Its germination was puzzlement about the "teach-yourself" phenomenon - and the more closely I looked, the more my puzzlement grew.

Many learners, faced with a need or wish to learn a foreign language, but unable or unwilling to find a suitable class, decide to go it alone. They buy or borrow a "teach-yourself" package, set to work... and what then? Anecdote has it that learners face a hard, lonely task with a high drop-out rate, and that materials are often dull and old-fashioned. But there is a puzzling lack of facts - especially puzzling if we compare this to the plethora of studies into every aspect of classroom language learning. As my researches began in the early 1990s, there was a methodological handbook (Dickinson, 1987) available, it is true. But I could find no published empirical studies - at most, a PhD thesis (Rybak, 1983), and an unpublished survey report (Roberts, 1992).

Yet lack of facts, it seems, has not prevented many second-language-acquisition professionals from regarding "teach yourself languages" with an amused disparagement normally reserved for the wackier fringes of classroom methodology: a puzzling attitude indeed for a profession which sees its tenets as based on scientific method. Indeed, the only paper on package-led self-instruction which I have seen at an academic conference (Roberts' 1992 report) was billed as an after-dinner Fringe Event!

Admittedly, most sciences have a field where angels fear to tread, where professional folk prejudice blocks the acquisition of objective knowledge. But the case of self-instruction is more complex and puzzling still, for the condemnation of teach-yourself - i.e. package-led self-instruction - coexists quite happily with an increasing advocacy of "self-access" and "learner autonomy" - i.e. independent learning as a way of getting an exact fit between learner and learning process (Sheerin, 1989; Holec, 1979; etc.). Moreover, the advocacy of autonomy seemed to have as little grounding in empirical

research as did the condemnation of teach-yourself - though, to be fair, the advocates of autonomy do tend to have direct experience of the phenomenon, and empirical studies have since grown in number (see e.g. Broady & Kenning, 1996a). The disparagement of teach-yourself, however, was and largely still is based on ignorance rather on experience.

Puzzlement about this methodological paradox was one reason I saw a need for an empirical overview of teacherless language learning. But the main, underlying cause was a positive, deeply personal one. I, like many of my acquaintances, had experience of trying to teach myself a foreign language. As a sixteen-year-old, for example, working through *Teach Yourself Serbo-Croat* in preparation for a home-stay visit to Yugoslavia (most of it, I recall, as I sat - eternal eleventh man - by the school cricket pitch): the first step, seemingly innocuous at the time, in a life-long involvement with the Balkans and all its passion and pain... Or as a student in Sarajevo, learning Dutch for the girl from Holland who was to join me there and, later, become my wife...

My intuition, therefore, was that it is possible to teach yourself a foreign language. And that even if it is a difficult means, it is one well worth investigating.

## 1.1.2 Broadening aims

As my investigations gathered pace, however, it soon became clear that even *ab initio* self-instruction also involves autonomous activities, i.e. activities prompted and implemented by the learner rather than the coursebook, and that their role grows with increasing proficiency. Moreover, it emerged that, as language learning is often a process taking years, a combination of classroom and self-instructed experience is actually more common than self-instruction alone, and therefore it would be foolish to ignore the interaction between the two modes.

The sequence of studies here reflect that widening of focus. As detailed below, the project as a whole aims to map out the field of self-instruction proper. The first pre-study, however, looks at the teach-yourself package per se; the second pre-study looks at both package-led and fully-autonomous self-instruction; and the main study, whilst concentrating on self-instruction, also examines its relationship with classwork.

## 1.1.3 Defining the task, defining the tools

The aim of this project, therefore, is to give an empirical overview of the **self-instruction** phenomenon in foreign-language learning. This I gloss (*pace* Dickinson, 1987) as a deliberate, long-term attempt planned, undertaken and evaluated by the learner her/himself, to learn a foreign language, with no class-teacher input at any stage.

My adopting such a narrow definition implies no theoretical quarrel with those who take a wider one: it is rather a case of customising an existing tool to enable it to probe a more precise area. This is illustrated by Figure 1.1.3/i below, which combines Dickinson's classroom-support and self-direction dimensions (see Literature Review 2.2.1 below) into a single "learner-independence" cline:

**Figure 1.1.3/i**

**Self-Instruction: Scope of the Project**



minimum learner
independence

maximum learner
independence

| classwork | homework | self-access/ teacher-led autonomy | teach- yourself | (full) autonomy |
|---|---|---|---|---|

| EXCLUDED | INCLUDED ("self-instruction") |
|---|---|
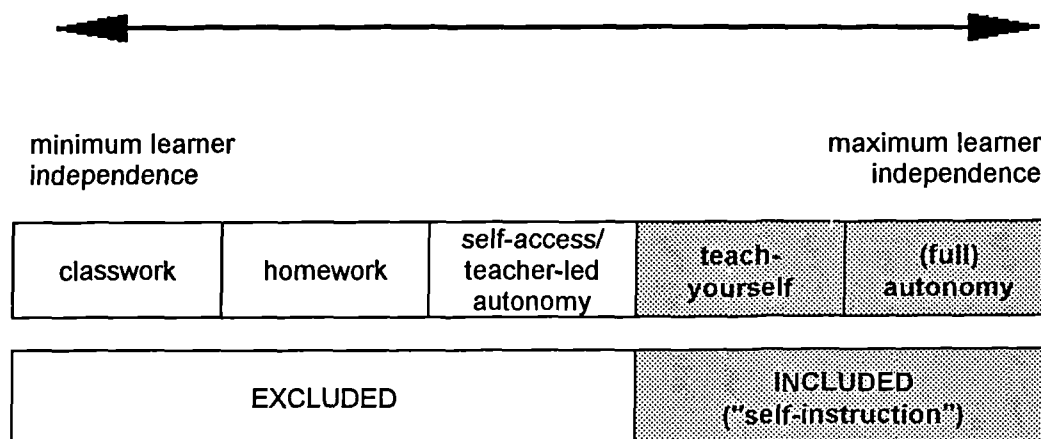
My definition of self-instruction, therefore, includes two paradigms:

- **teach-yourself**, which I define as solo work led by the syllabus of an all-round language-learning package

- **full autonomy** (cf. Dickinson's "fully-autonomous learning": pp. 11, 13), which I define as solo work based on discrete pedagogic materials (e.g. grammar-

books or one-off worksheets) and fully-authentic materials or tasks (e.g. off-air videos or conversations with native speakers), but to the learner's own syllabus.

I exclude, therefore, from the scope of this project - and thus from my working definitions of "self-instruction" and "full autonomy" - not only teacher-led **classwork**, but also teacher-set **homework** and **self-access**. Self-access generally denotes learner-selected materials work as a backup to classwork, with teacher guidance ranging from highly prescriptive to completely absent (Sheerin, 1989); with it, however, I also group what might be called **"teacher-led autonomy"** - in other words, the "contracting out" of whole syllabus strands of a taught language course (e.g. the listening skill) to solo work, but with teacher prompting, support and (often) evaluation (see Broady & Kenning, 1996a for examples). Self-instruction I also see as distinct from **naturalistic** immersion in the second-language environment without a deliberate strategic plan; and from **distance learning**, or teacher-led learning via correspondence, etc. (Rowntree & Connors, 1979).

This is not to say that the borderlines between self-instruction, self-access/teacher-led autonomy, naturalistic and distance learning are not fuzzy, or that findings from one area might not be extended to others. My purpose, however, is to restrict the scope of the project to a field that is not only under-explored, but also - I hope - not too wide to explore coherently.

## 1.1.4 Research methodology

To investigate this field by standard hypothesis-testing means, however, would have presupposed knowledge that does not exist. Self-instruction is still very much a *terra incognita*. It is true that empirical forays by Rybak (1983), Reeves (1993) and Roberts (1992, 1995), and methodological journeys such as those of Dickinson or Doyle & Meara (1991), have shown us the lie of the land. But hypotheses need to be drawn up on the basis of a map of the field, otherwise they are likely to be random stabs in the dark. And a map of the self-instruction field is precisely what we do not have.

The main purpose of this project, in fact, is to draw such a map - an empirical overview of its learners, their characteristics, their processes, of their materials and how they use

them. The mapping-expedition analogy, in fact, has determined this project's whole research methodology: a series of maximally open-ended surveys, based more on perception than on "hard fact", perhaps, though with a quantitative/statistical backbone strong enough to ensure that the perceived image is a well-grounded, generalisable one. I would claim, in fact, that though the map describes subjective phenomena - i.e. learning as perceived by the learner - it is drawn up as objectively as its subject-matter allows. Moreover, as I argue later (5.1.2), learner perceptions, especially when dealing with self-instruction, are not some epiphenomenon that gets in the way of the "real" facts of learning - rather, they form the very core of learning, its power-source and guide.

# 1.2 The Project: An Overview

Before mapping proper can start, the self-instruction field must be reconnoitred. The first stage is to gather the experiences of others who have travelled in this and similar regions. This is the purpose of the background literature review (Chapter 2) - inevitably wide-ranging, in view of the sheer size of territory to cover.

Two areas, however, have hardly been addressed in the literature - at least when this project had its genesis. These are: the anatomy of published teach-yourself packages, and the learning processes of the self-instructed learner. This necessitated two scouting forays of my own. The first (Chapter 3) presents a taxonomy of the sort of materials the *ab initio* teach-yourself learner would be likely to meet. The second (Chapter 4) is a longitudinal diary study of the researcher's own learning of Hungarian, indicating at least one learner's materials-use, learning strategies, and some of the other factors that might affect the learning process.

It appeared from the forays that published teach-yourself packages are no more homogeneous than a similar set of classroom packages, and that package use is only part of a complex picture of learner behaviour, perceptions and characteristics that can change with time and developing proficiency. The only way, it seemed, of mapping such complexity and variety was to enable as many learners as possible to talk as freely as possible about their experiences. The main study (Chapter 5), therefore, consists of a cross-sectional interview survey of the past and present language-learning experiences and reported achievement profiles of seventy self-instructed learners. As most of these learners had experiences of both classwork and self-instruction, often within the same language, this also enabled an examination of the differences and interactions between the two learning modes.

The Conclusion (Chapter 6), shows how the self-instruction map - of learners and their materials, processes and achievements - might be used. Implications for learning theory and further research are discussed, and sets of concrete recommendations are given for package designers, self-instructed learners, and language-learning organisations.

# CHAPTER 2

# LITERATURE REVIEW

# 2.1 Introduction

This review of the literature aims to situate solo language learning within a framework of language learning as a whole. Firstly, the self-instruction field *per se* is sketched in terms of definitions, justifications and research findings (2.2). Then (2.3) a background is laid for the project in terms of general second-language acquisition (SLA) theory and research. Section 2.4 focuses on learner variables in general. Section 2.5 looks at materials design with special reference to self-instruction, whereas Section 2.6 looks at the issues involved in preparing and supporting the learner through the self-instruction project. Finally (2.7), the research methodology used in the studies is introduced.

# 2.2 Self-instruction, teach-yourself and autonomy

## 2.2.1 Definitions and concepts

In the Introduction (1.1.3) I define the scope of the project as "self-instruction" in the narrow sense of a long-term, consciously-driven, teacherless language-learning project, and see it as being made up of two paradigms: package-led "teach-yourself", and learner-led "full autonomy". To Dickinson (1987), however, self-instruction is not so much a solitary setting as an independent attitude: "responsibility in learning" (p. 8) - hence it refers to any situation where the learner is not working under direct teacher control, including my "self-access/ teacher-led autonomy" category (Figure 1.1.3/i).

Dickinson, in fact, sees self-instruction as depending on the interaction of two variables. The first considers the amount of classroom support available to the learner, giving a continuum from self-access (solo work as backup to classwork: Sheerin, 1989) to teacher-free "total self-instruction" (p. 8). This dimension defines the bounds of the present study, with my "self-instruction" corresponding to Dickinson's "total self-instruction".

Dickinson's second dimension, degree of self-direction, describes the extent to which learners take active responsibility for their own learning (1987, pp. 11, 12; cf. Holec, 1979, p. 4). A similar (and more widely-used) concept is "autonomy" - the difference being, in Holec's terms, that autonomy is the ability "to take charge of one's own learning" (1979, p.3), whereas self-direction is its practical implementation (1979, p. 4). Later writings, however, see autonomy as both ability and implementation (Holec, 1988; Dickinson, 1987, p. 11; Dickinson, 1995; Broady & Kenning, 1996b). Both Holec (1988) and Dickinson see materials-led self-tuition as non-autonomous, as the learner has merely replaced a flesh-and-blood teacher with a paper-and-tape one: thus this dimension separates my "teach-yourself" from my (and Dickinson's) "full autonomy".

Behind the definitions in the autonomy literature lie certain assumptions. Teach-yourself, insofar as it is mentioned at all, tends to be seen as a steady state, an alternative to classwork. Autonomy, by contrast, tends to be viewed as a process, as a moving away from and simultaneously an enrichment of classwork (hence "teacher-led autonomy" as one of its chief practical applications: cf. Broady & Kenning, 1996a). The implication, therefore, is that autonomy - especially full autonomy - is a second stage of learning: understandably, perhaps, no writers advocate complete independence from package or teacher for *ab initio* learners.

These, however, are implications and omissions, not statements. To the best of my knowledge, proficiency rarely if ever figures in the classwork vs. autonomy debate. This is linked to a more grievous lack: the "teach-yourself bad, autonomy good" dichotomy has virtually no basis in terms of learner achievement studies (if there were such a basis, it might have forced the proficiency issue into researcher consciousness: cf. Reeves, 1993 below). Empirical studies into both halves of the dichotomy are few - and what little there is tends, if anything, to show the opposite. Nevertheless, I will now look at what research there is into package-based self-instruction, followed by a sketch of key issues in the learner autonomy movement.

## 2.2.2 Package-based self-instruction

At first sight, the view that teach-yourself packages are a Bad Thing does have some empirical backing. Hayet (1990/91), for example, debunks the peddling of "language learning mythologies" by the more unscrupulous course publishers:

★ "Learning a foreign language is easy": "after an average of ONLY 24 HOURS' study you'll be able to converse freely, with a good vocabulary and an authentic accent" (Programmed Instruction Language Learning, cited by Hayet);

★ "Learning a FL is relaxing" - i.e. it requires minimum cognitive involvement;

★ "Listening is sufficient for acquisition"; "all you need is provided" - i.e. interaction is not needed.

★ "Our method is scientifically proven" - i.e. it relies on gadgetry and gimmickry;

Roberts (1992, 1995), in a survey originally carried out for the Consumers' Association (Consumers' Association, 1990), looked at a range of packages, though focusing on expensive cassette-based courses (*Linguaphone*, etc.). He found that the latter fared the worst, backing up Hayet's impressions. They were dominated by outdated, "single-method" approaches ranging from the dull to the wacky, and fixated on language as medium at the expense of language as message.

Roberts' raters, however, also found methodologically sound and up-to-date packages, the prime example being the much cheaper BBC courses - something which Hayet's single-rater, impressionistic overview ignores. This is backed up by Rybak (1983): in a large-scale survey of BBC coursebook plus live-broadcast learning, she found high learner satisfaction.

There is some evidence, however, that the problem with teach-yourself might lie in the isolation of the learning method itself: high learner dropout in teach-yourself mode is reported both by Rybak (1983) and Reeves (1993). Rybak's study, in fact, focused on how to improve this dropout: she did so by setting up support features such as help-lines and learner support groups.

Holec (1988) and Hayet (1990/91) attack teach-yourself from the opposite angle, i.e. that the learner, far from being too independent, is still dependent on the surrogate teacher of the coursebook: "the learner is [...] regarded as a basically passive and supine being" (Holec). As neither I nor the authors cited can produce empirical grounds for this claim, it is probably best regarded as a statement of ideology rather than learning fact.

But what of the links between teach-yourself packages and achievement per se? To the best of my knowledge, only Reeves (1993) addresses this crucial issue. In a study comparing teach-yourself, distance and classroom methods using the same materials, he found - surprisingly - that teach-yourself gave the highest proficiency gains. Starting proficiency, however, appeared to be a crucial variable: Reeves' learners as a whole seem to span the "intermediate" band; and the 50% of teach-yourself learners who survived, and thus supplied their group's impressive proficiency-gain data, were those with higher scores on the initial tests. In other words, achievement and persistence in teach-yourself may be highly dependent on starting proficiency.

## 2.2.3 Autonomy

In contrast with teach-yourself, there is a large literature dealing with autonomy - so much so that learner autonomy has gained the status of a movement. Yet direct empirical studies into learning mode and achievement are as few as with teach-yourself: astoundingly so, given the plethora of ideological and methodological writings in the field. It is possible, however, to derive arguments for autonomy by extrapolation from more firmly-researched areas.

Dickinson, for example, reviewing other sources (1995), sees autonomy as strengthening both intrinsic motivation (i.e. motivation within the learning process itself) and the learner's view that learning occurs because of oneself rather than an external agency. Both factors appear linked to success.

Autonomy enables personalization of texts and tasks, i.e. basing them on the learner's own interests and experience (cf. Campbell & Kryszewska, 1992). This may well increase intrinsic motivation by gearing input to need and ensuring learner ownership of task. There is also empirical evidence that personalised output increases retention of input (Slimani, 1989).

Broady & Kenning (1996b) argue that autonomous interpersonal communication activities are needed for learners to develop a full range of communicative skills - especially if, as Hayet (1990/91) claims, traditional (large, teacher-centred, lockstep) classes provide few opportunities for student production.

The only empirical study into autonomy and achievement known to the researcher (Dam, 1982, in Gremmo & Riley, 1995) showed no difference in achievement between classwork + (teacher-led) autonomy on the one hand and classwork-only on the other, though the learners' "learning competence" - presumably a strategic ability - was higher. This latter finding ties in with studies showing that learner strategies can be trained (discussed in 2.4.3.c.iv below). Sophisticated learner strategies are presumably a precondition for autonomy; the trainability of strategies, however, might well show that autonomy can be trained, but does not show whether it is effective per se.

Nevertheless, there is evidence that many class learners who undergo autonomy training (Broady & Kenning, 1996a, *passim*) come to *believe* that autonomy is more useful than classwork alone. They may show apprehension or resistance, however, especially at first (Broady, 1996): as Broady points out, responsibility may aid confidence by giving us control over our circumstances, but also requires us to face our weaknesses.

The most oft-cited argument for autonomy is based not on evidence but on ideology: that of learner empowerment (Holec, 1979, 1988; Little, 1990; Kenny, 1993; cf. Crabbe, 1993). "Directed learning" it is claimed, amounts to the imposition of inflexible external goals and structure on the learner; taking charge of one's own learning, therefore, means reaching for what post-enlightenment Western thought sees as the higher good of greater personal freedom. However, a counter-argument might be that, when learners are exploring a field they do not yet know, robbing their learning of structure actually disempowers them.

Nevertheless, as with the communicative movement of a decade earlier, the lack of hard SLA evidence has not prevented methodologists and teachers from assembling a useful body of autonomy-training activities and experience in their implementation (see e.g. Gathercole, 1990; Broady & Kenning, 1996a; cf. Oxford, 1990). These should not be sniffed at: teacher intuition, especially if backed up by learner intuition, can be as valid a source of evidence as empirical research.

## 2.2.4 Reasons and risks in self-instruction

### 2.2.4.a Reasons

Why do learners decide on self-instruction? Two main categories emerge from the literature (Rowntree & Connors, 1979, pp. 10-12; Dickinson, 1987, pp. 18-35; Consumers' Association, 1990; Hayet, 1990/91; Barnett & Jordan, 1991; Doyle & Meara, 1991, pp. 18-20). Practical reasons are a lack of classes in the L2 at a time and place convenient for the learner, or a misfit between the learner's needs and the lessons on offer. Several authors, however, claim that the learning advantages assumed for learner autonomy apply *par excellence* to self-instruction: for example, that self-

instruction allows learners to tailor their learning towards their own individual characteristics, aims, strategies and pace.


### 2.2.4.b Risks

Self-instruction has undeniable disadvantages in comparison to classwork, several of which have already been discussed. The Consumers' Association (1990) identifies three crucial threats to motivation: lack of conversation practice, lack of feedback on errors, and self-discipline and perseverance problems. Looking at both self-instruction and voluntary classes, Doyle & Meara (pp. 115, 143-144) identify several warning signs of impending drop-out from the learning process altogether: input overload, a fear of communicating and making mistakes, and an unrealistically low image of one's own proficiency and progress. These dangers, however, may be more a feature of teach-yourself mode and/or low proficiency (cf. Rybak, 1983; Reeves, 1993: 2.2.2 above).


## 2.2.5 Summary and implications

Package-led self-instruction, therefore, offers materials of varying quality, high dropout risk, but the possibility of good progress for those who survive. Though direct empirical evidence is scant, "autonomous" work is widely believed to aid the learner - a belief which learners (at least in teacher-led autonomy mode) can come to share, and which has borne practical methodological fruit. Starting proficiency might be an important variable in determining success in self-instruction.

But these are details: what we lack is an all-round, empirically-based model of teacher-free instruction. Hence the main thrust of the present studies: to provide such a model. Moreover, the crucial question of how much added value (if any) autonomy might have over classwork is unanswered, and the relationship between starting proficiency, achievement and dropout deserves deeper investigation. The learner-profile database that supplies the self-instruction model also enables these latter questions to be addressed.

There also appears to be a need for a wider analysis of teach-yourself packages than the "expensive" and BBC courses already surveyed - an analysis which deconstructs the package so that designers can avoid "bad" features and incorporate "good" ones. Such a survey forms the first pre-study of the present project (Chapter 3).

# 2.3 Learning Processes

## 2.3.1 Introduction

The fact that we have little direct evidence for the effectiveness of self-instruction does not mean we know nothing about its workings. As long as we proceed with caution, extrapolating from relevant classroom research on the one hand and methodological nous on the other can supply us with a provisional sketch-map of the self-instruction field. Thus, when our mapping expedition proper starts, we will already have a good idea of the lie of the land.

I start by looking at the contribution of SLA (second-language acquisition[1]) theory and research to the issues addressed in the present set of studies. For fuller overviews of the SLA field, see Ellis R. (1990, 1994), Larsen-Freeman & Long (1991) and Cook (1991).

## 2.3.2 Theories of language and language acquisition

### 2.3.2.a Behaviourism

Behaviourist learning theory (e.g. Skinner, 1957), which saw language as automatized, unthinking reactions to one's social environment, was especially influential in the 1950s and 1960s, laying the base for audio-lingual repetition and drilling methods. Though since denigrated as a full explanation of language acquisition, it would appear reasonable to see language as at least partially dependent on low-level, automatic skills amenable to rote learning or controlled practice (cf. cognitive theory below).

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[1] I use the terms "acquisition" and "learning" interchangeably.

## 2.3.2.b "Systemic" approaches

Halliday (1978) echoes Skinner in seeing language as a social creation which is learnt both for and through social contact. But, in contrast to behaviourism, Halliday sees language - and language acquisition - as the *active* construction of meaning (*Learning How To Mean*: 1975). His "systemic" model of language production and structure sees meaning as gaining linguistic form through a single, complex network of choices: discourse structure, syntax, lexis, morphology and phonology/orthography, therefore, are not separate modules, but increasingly fine levels of choice.

## 2.3.2.c Universal grammar

Early universal-grammar (UG) based approaches (see Towell & Hawkins, 1994, for overview), by contrast, saw language as modular, and much of it, especially grammar and phonology, as driven by deep, innate systems. Over the years, however, the role accorded to universal grammar in language as a whole has shrunk considerably. Moreover, recent UG thought sees much of grammar as dependent on the peculiarities of individual lexical items, thus raising the lexicon from a secondary to a key player in language use, and echoing Halliday in eroding the boundaries between grammar and lexis. In SLA, recent debate has focused on whether innate, universal components have any role at all in adult foreign language learning; the prevailing view (e.g. Shelton, in progress; Tsimpli, in Towell & Hawkins) now seems to be that adults learn foreign languages largely by general learning processes, with universal grammar playing at best a marginal role.

## 2.3.2.d Cognitive models

Cognitive learning theory (see Anderson, 1990 for overview) is becoming widely accepted as providing a powerful account of the role of general learning processes in SLA - or at least its non-universal aspects (O'Malley & Chamot, 1990, pp. 16-55, Ellis R., 1990, pp. 175-184).

Key concepts in cognitive learning theory are attention, control and automaticity (Schneider & Shiffrin, 1977a, 1977b; Anderson, pp. 52-58). New tasks (e.g. a novice driver attempting a gear-change) are approached in a "controlled" way - i.e. with high "attention" to every detail. The problem is that working memory limitations will only allow one high-level task (i.e. the gear-change) and very few underlying details (e.g. clutch motions) at a time - therefore there is no free attention for other high-level tasks (e.g. watching the road). When the same task is done repeatedly, however, processing becomes "automatic" - fast, memory-efficient, but (because it takes place outside conscious control) even harder to unlearn than to learn.

The implication here is that language learning is a process of automating low-level, repetitious aspects of the message (pronunciation, grammar, vocabulary) to free up working memory for controlling high-level aspects of the message (intrinsic content, role relationships, etc.); but also that bad low-level habits (e.g. mistaken grammar rules or pronunciation forms from other languages) can be hard to break.

Looking at the underlying memory store, Anderson (1990: 219ff) sees two different types of knowledge: **declarative** (knowledge of discrete facts, e.g. that caterpillars grow into butterflies) and **procedural** (ability to do things, e.g. juggle). The development of a skill, to Anderson, involves the gradual conversion of declarative knowledge (e.g. the facts of a grammar rule) to procedural (e.g. the ability to use a grammar rule) - through **practice**. More precisely, repeated working memory overload caused by having to summon up the same chain of facts makes them cluster into a single, complex action plan, which puts much less load on working memory.

The implication for language learning is that practice should always aim to overload the working memory (but not so drastically as to lead the learner to abandon the task!). This would seem to justify a "stepping-stone" series of practice activities, starting with highly-controlled work and finishing with complex, fast, real-message work - which, as it involves controlling the most variables in the shortest time, puts working memory under the most pressure (Johnson, 1987). Anderson (p. 256ff) adds that:

- practice gives initially high gains, but with rapidly-diminishing returns as the session continues; "spacing" of sessions overcomes this problem (so language learning sessions should be short and frequent rather than long and infrequent);

- when practice stops, many practised items are gradually forgotten, but are gained much more quickly in a subsequent session (so attrition is inevitable, but regular revision counteracts it);

- tasks that require simultaneous control over different sub-systems are best practised separately, but those that require "careful integration" are best practised as a whole (so learners perhaps need practice both in individual sub-systems, e.g. pronunciation, and in whole skills, e.g. full-speed speech);

- explicit, immediate feedback helps, but too much can overload the learner (in self-instruction, underload is probably going to be more of a problem than overload).

Anderson sees the declarative→procedural process as one-way; but there seems no reason why procedural knowledge should not also become declarative. There is evidence, for example, that the use of "holophrases" or "formulae" (extended chunks of real language) can precede the ability to use their underlying grammatical and lexical units (Peters, 1983; Pawley & Syder, 1983; Weinert, 1995). In language-learning terms, this implies that a combination of real-text input and real-message output should be used as well as controlled→free sequences.

Ellis N. (1994) sees degree of conscious awareness as an important factor in L2 acquisition. Explicit skills - such as knowing the semantic and conceptual meaning of vocabulary items - are best learnt by "elaboration of meaning", i.e. conscious manipulation of both form and meaning; here rote learning is ineffective. Implicit skills, by contrast - such as real-time speech production - he sees as being acquired by practice without conscious attention; here, rote techniques (repetition, drilling) are useful.

Logically, learners should acquire most automaticity in those skills (e.g. full-speed listening, formal writing) which they practise most (the "discourse hypothesis": Ellis R., 1990, pp. 119-121). But can automaticity acquired in one such skill be transferred to another (a crucial question in self-instruction, where realistic practice in speaking is difficult to obtain)? According to Anderson (pp. 284-287), if a certain sub-skill or knowledge underlies two different high-level procedural skills (e.g. grammar vis-à-vis speaking and writing, perhaps), it seems that the sub-skill can transfer; and systems

seen as analogous may transfer (e.g. similar grammatical paradigms across languages). But high-level procedural skills themselves do not transfer if they operate in different domains (e.g. speech and writing: Swain, 1985, in Ellis R., p. 121).

## 2.3.3 Learning means

At a more detailed level, one of the key debates in recent SLA research and theory has been between the rival merits of four different procedures:

★ formal, instructed input;

★ informal, real-text input;

★ formal, "controlled" output;

★ informal, "communicative" output.

Less frequently discussed is the status of metalinguistic knowledge, i.e. knowledge about language in the abstract. All five areas are discussed here, plus notes on the key areas of lexis and grammar.

### 2.3.3.a Formal input

Research evidence (see Ellis R., 1990 for overview) points against Krashen's famous assertion (e.g. 1981, 1985) that explicit instruction in language as form is largely irrelevant to the acquisition process. Instructed input speeds up acquisition in many settings (e.g. Spada, 1986, in Ellis R., 1994, p. 615; Jones, 1992; Zhou, 1992), and appears decisive in gaining higher proficiency levels. As to the precise means used, Zhou adds that deductive explanation is a useful short-cut with conceptually-simple rules, but that inductive exposure to controlled examples of usage is better with complex rules.

### 2.3.3.b Informal input

There is widespread acceptance of the value of real-text input - as long as it is "comprehensible" to the learner (Krashen, 1981, 1985). The exact nature of its usefulness is the focus of debate, however. Krashen and Ellis R. (1990), for example, both see informal input as the prime mover of acquisition. But where Krashen sees formal instruction as irrelevant to acquisition, Ellis sees formal instruction as making real-text input more effective - by telling learners what key features to look out for in real-text input (the "monitoring" process: cf. Morrison & Low, 1983; Bialystok, 1981).

Vocabulary research indicates, however, that real-text input alone can improve receptive knowledge (Pitts et al, 1989; Day et al, 1991), but is ineffective at improving productive knowledge (Bialystok, 1981; Mondria & Wit-De Boer, 1991; Laufer, 1994). Ellis N. (verbal reply to Hulstijn, 1994) points out that it is not so much the input-type that determines learning, but the degree of attention - hence most items in real text will get relatively little attention, but a highly-memorable item (e.g. a dirty word) can be learnt productively even from one encounter.

### 2.3.3.c Formal output

As for controlled output practice of language as form, research such as that of Bialystok (1981) and Ellis R. (1988) claims that it is much less effective than "functional" (i.e. message-based) practice in producing overall language improvement. Much of this evidence, however, is based on the learning of grammar. Formal, controlled practice might still have advantages in the learning of discrete sub-skills, such as pronunciation, and cognitive theory (2.3.2.d above) indicates that it might well form a vital first stepping-stone towards functional, message-based practice.

### 2.3.3.d Informal output

Real-message output, whether interactive or not, is widely seen as crucial in building up productive fluency, with few sharing Krashen's view that it is irrelevant (Allwright,

1976; Swain, 1985; Ellis R., 1988; Slimani, 1989; Jones, 1992) - though Swain points out that output practice should not only "get the message across", but should push the learners to be as accurate as possible.

By and large, however, the consensus seems to be that one learning means is probably not sufficient - and certainly not efficient - for language acquisition. A combination of formal and functional work on both input and output probably leads to the most efficient learning - especially if the different means are used in relatively close proximity (Spada, 1986, in Ellis R., 1994, p. 615).

### 2.3.3.e Learning vocabulary

This even applies to seemingly discrete sub-skills, such as memorising lexis for production. Here - generally speaking - the greater the attention, the greater the retention, so:

★ guessing from real text appears ineffective in isolation (see above);

★ word-lists (Arnaud, 1992) and out-loud/mumbled repetition (Sinclair & Ellis N., 1992) seem moderately useful;

★ keyword-imagery (finding an L1-L2 pun, e.g. German *Rathaus* = English *town hall*, so imagine rats running out of a town hall) and dictionary look-up are effective (Brown & Perry, 1991; Hollander *et al*, 1995);

★ using items in real contexts and messages appears the best single method (Brown & Perry).

But a combination of techniques works best of all (Brown & Perry).

Target vocabulary is often presented by "semantic field", especially with lexical and situational syllabuses (e.g. Unit 11: Transport: cf. 2.5.3.c below). This can give rise to interference effects, however: it appears that learning takes place faster if items are *not* semantically related (Tinkham, 1993).

Vocabulary knowledge may be the single most important element of language proficiency. Meara (1993) argues that "lexical access" (i.e. knowledge + real-time processing) is fundamental to speaking and listening skills, and Laufer (1992) sees lexical knowledge as the key determiner of reading ability.

**2.3.3.f Learning grammar**

With certain sub-systems of language - especially grammar - a simple "practice-makes perfect" model fails to account for fixed developmental orders (e.g. Dulay & Burt, 1974; see Ellis R., 1994, pp. 82-117): the fact that certain structures (or parts of complex structures) cannot become automatic before an earlier "stepping stone" is in place (Pienemann, 1992; cf. Ellis, pp. 382-389). The implications here are that much of grammar should be carefully sequenced (hence the popularity of "structural" syllabuses: 2.5.3.c); and that even so, the gap between first meeting a complex grammar item and accurate, automatic production may well be a very long one.

**2.3.3.g Metalinguistic awareness**

As for metalinguistic awareness - the ability to reflect on language in the abstract - research by Alderson *et al* (1995) indicates that skill in using terminology to describe language is unrelated to L2 performance.

## 2.3.4 Transfer and cognacy

The effects of other languages known - "language transfer" - has long been recognised as an important variable in second-language (L2) learning. Mother tongue (L1) effects have been the main focus of research and speculation (see Gass & Selinker, 1983 and Odlin, 1989 for overviews).

The likelihood of transfer is dependent on language area (more in pronunciation, say, than grammar) and specific language pair. In lexis, transfer is obviously much more likely with a cognate language, i.e. one where many vocabulary items show formal and semantic similarities (Carroll 1992; Meara, 1993). Overall, cognacy seems to be an advantage rather than a disadvantage. Thus learners of an L2 cognate to their L1 outperform those who learn a lexically alien L2 (Ringbom, 1987, in Granger, 1993):

false friends (e.g. English *actual* ≠ general European *aktuell*), in other words, appear outweighed by true friends. Moreover, the twin factors of linguistic and cultural closeness are seen by Tudor (1992) as influential in enabling learners to cross from teacher-centred to autonomous learning.

Meara (cf. Granger) points out that some L1-L2 pairs are only partially cognate, i.e. when some registers/styles of the L2 are cognate and others are alien (e.g. basic vs. formal L2 English for a German L1 speaker). According to Meara, teaching strategies should depend on the precise relationship (cognate, non-cognate, or partially cognate) between the language pair in question.

There may also be a subjective dimension to transfer. Learners may be over-aware of the danger of false friends and avoid cognate items altogether (Meara; Sikogukira, 1993), or use strategies such as "words transfer, idioms don't" (Kellerman, 1983). Kellerman also points out that formal resemblances between language items are less important in learning terms than the learner's *perception* of language distance. Transfer may also depend on proficiency and learner-individual factors such as personality, though links here are less sure (Odlin).

Recent studies have shown that other foreign languages known (see Fouser, 1995 for overview) - which (*pace* Fouser) I refer to as L3s - are potentially powerful sources of transfer data when learning a new language. In fact, some sources indicate that learners may transfer more readily from the L3 than from the L1, even if the L1 is philologically closer (Benson, 1990; Bissell, 1990; Håkansson, 1994).

## 2.3.5 Learning thresholds

Vocabulary research raises the possibility that L2 learning may not be so much a gradual evolution as a step-like (phase→threshold→phase) progression. Hirsh & Nation (1992) identify a 2000 "word-family"[2] vocabulary size as a threshold at which many authentic L2 texts suddenly become comprehensible; Nation & Hwang (1995) point out that this is roughly equivalent to West's *General Service List* (1953). Meara (verbal seminar contribution) claims a second threshold at 5000 words, though on unspecified grounds. Nation & Hwang also found that, once learners have reached the 2000 word-family threshold, it is better for them to specialise in their own subject-areas than to learn the next 1000 most frequent word-families. This may well be the point, at least in terms of building up underlying lexical knowledge, at which personalised/autonomous work becomes more efficient than non-autonomous work (whether class or teach-yourself).

Similarly, Van Ek, in his European-Community-wide *Threshold Level* syllabus specification (1973), proposes a vocabulary of 1500-2000 words as "adequate" for communication in an L2 environment. In listening, he defines the adequacy threshold as the ability to grasp the gist of utterances; and in speaking, as the ability to get a message across.

## 2.3.6 Summary and Implications

It appears that language learning and use involves a complex combination of conscious and unconscious processes and knowledges. Instruction, it seems, works best by combining a wide variety of input and practice techniques that reflect this complexity, targeted at a level that gradually stretches the learner's competence. Under certain circumstances, learning is affected by transfer from other languages. It may also be conditioned by the crossing of an intermediate "communicative-adequacy" threshold.

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[2] A group of words using the same core lexeme, e.g. "courage, "encourage", "courageous".

In the present studies, the maximum-variety criterion forms the implicit skeleton not only of the package-design recommendations (Checklist Chapter 3; Design Guidelines 6.3), but also of learner advice in general (6.4). Language transfer is examined in all three studies. However, it was the occurrence of the threshold issue in the learner-based studies (Diary Chapter 4, Language Experience Survey Chapter 5) which prompted a search for back-up evidence in the literature - not vice versa.

# 2.4 Modelling the Learner

## 2.4.1 Introduction

Having looked at the learning process, I propose to examine the role of the learner: firstly, what pre-existing qualities she[3] brings to the process; secondly, how she can consciously influence the process; and thirdly, the special characteristics of the self-instructed learner.

## 2.4.2 Learner characteristics

Here I look at how "learner characteristics" (Stern, 1983, p. 338), which I define as individual factors largely outside the learner's conscious control, may affect the second-language learning process (Skehan, 1989; Ellis R., 1994, pp. 471-528). Thus the potentially more conscious learning "strategies" (O'Malley & Chamot, 1990) will not be addressed here, but in Section 2.4.3 below.

I group learner characteristics into four categories: physiological, affective, personality and cognitive (cf. Stern). Again, only topics relevant to the present project will be discussed.

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[3] Where generic pronouns are unavoidable, I use the female - in deference to the slight female majority in the Language Experience Survey (Section 5.4.1)

**2.4.2.a Physical and background factors**

2.4.2.a.i Age

There are differences in L2 learning rate and ultimate proficiency between children of various ages, adolescents and adults (Ellis R., 1994, pp. 201-202, 484-494; Romaine, 1989; Singleton, 1989). Adults - the focus of the present project - use exposure/ instruction time more efficiently than children, and are thus likely to make relatively rapid initial gains (Snow & Hoefnagel-Höhle, 1977). Various reasons have been cited: that adults have more refined cognitive processing techniques, greater "meta-awareness", memory, and learning experience in general, and/or an ability to work towards more deferred goals (Ellis, p. 493).

Most adults, however, fail to reach native-speaker proficiency levels (though some do: Bongaerts, 1995) - possibly because they see effective communication (and perhaps preservation of L1 identity) as more important than complete conformity to L2 norms (Neufeld, 1978). This implies that the adult who does have the aim of integration into the L2 community is the one who achieves the most native-like L2 use (Schumann, 1978).

The effects of different ages within adulthood has, to the best of my knowledge, not been addressed by SLA research. General psychological research indicates, however, that increasing memory loss from young adulthood to old age is largely - but not wholly - compensated for a growth in formal reasoning, common sense and learning strategies (Child, 1977: p. 258ff)

2.4.2.a.ii Gender

There are few published findings into the effects of gender on adult SLA achievement, though Oxford (1989) reports that females are the better strategy-users (see 2.4.3.c.ii below). Females are also more likely to study modern languages in Britain, both at tertiary (Evans, 1988) and at secondary level (Powell, 1986). Powell, however, like several other authors, sees this as based less on innate differences than on the tendency of teenage boys to adhere more to covert ethnocentric norms.

## 2.4.2.b Affective factors

Many authors see affective (i.e. emotional) factors as playing a important role in SLA. Krashen (1981, 1985), for example, sees an open affective attitude as the key enabler of language acquisition; and Allwright (1993) puts "atmosphere" on a level with "content" and "method" as one of the 3 base variables in language teaching. In a survey of neurolinguistics/SLA research, Jacobs & Schumann (1992) suggest that Krashen's intuition may be right: affect, it seems, is the driving force behind cognition (and thus learning), for the amount of attention paid to stimuli is governed by factors such as novelty, pleasantness and how the stimuli relate to the perceiver's goals, needs and self-image.

The two main affective factors cited as affecting the learner are motivation and attitude.

### 2.4.2.b.i Motivation

Motivation may be defined as goal(s) or reason(s) for learning an L2 (see Skehan, 1989, pp. 25-44 and Ellis R., 1994, pp. 508-517 for overviews). Motivation may be of different types, e.g. instrumental (for an external purpose, e.g. promotion at work: Gardner & Lambert, in Ellis R., ibid.) or integrative (out of liking for the target language or culture); intrinsic (within the learning process: Dickinson, 1995) or extrinsic (outside it). Different motivations may apply at different levels, e.g. a learner may find a task unmotivating per se, but be motivated by the task's linguistic content and by the overall aim of mastering the L2 (Jones, 1991a).

Strength of motivation is recognised as a key factor in foreign language learning. The relationship between motivation and SLA may well be two-way, however, with success breeding success and failure failure (Burstall et al, 1974, pp. 234-235). O'Malley & Chamot note (1990, p. 161) that motivation may also be transferred from other learning experiences (e.g. learning another FL).

As for motivation sub-types, they should be appropriate to the learning setting: thus instrumental motivation may be better than integrative where the L2 is a lingua franca rather than a specific community's language (Lukmani, 1972). A combination of motivations, however, is better than one (Burstall et al).

Autonomy as a potential motivator is discussed in 2.2.3 above.

2.4.2.b.ii Attitude

Attitude may be defined as a set of emotional value-judgements either about the L2 culture or about certain learning activities (Brown, 1981; Ellis R., 1994, pp. 198-200). Attitude towards L2 culture seems most important in certain learning settings, i.e. where the L1 community has a distinct stereotype (positive or negative) of the L2 community (cf. Gardner & Lambert, 1972, cited in Ellis R., ibid.; Schumann, 1978). Thus, for the British, stereotypical attitudes might affect the learning of German, say, but probably not of Danish.

As for attitudes towards the learning process, a positive attitude towards learning in general seems to be an important enabler, especially in the early stages (Naiman et al, 1978, p. 100). Regarding the conflicting appeals of structured vs. autonomous L2 learning, Ellis R. (1985, p. 103) reports wide individual variation, though methodologists undertaking diary studies and language teachers tend to prefer the latter.

## 2.4.2.c Personality factors

Personality factors appear to mark out the boundaries and relationships between the self and the outside world (McDonough, 1986; Skehan, 1989; Ellis R., 1994, pp. 517-522).

The extroversion↔introversion cline is both well grounded in general psychology (Eysenck & Eysenck, 1991) and well researched in SLA terms (Ellis, ibid.). Extroversion - especially talkativeness, responsiveness and gregariousness - appears to aid spoken communication (Strong, 1983), and shy students do not like classroom oral work (Naiman et al, 1978). Introversion, by contrast, seems linked to academic study of languages: Evans (1988) reports that most tertiary-level modern languages students at British universities are introvert (as compared to English majors, who tend to be extrovert).

With other aspects of personality, the picture is much vaguer. As Ellis points out, traits identified by psychologists (e.g. Eysenck & Eysenck) tend not to be investigated by

SLA researchers; and traits posited and examined by SLA researchers have little reference to wider psychological theory and give few clear findings.

### 2.4.2.d Cognitive factors

These factors determine how a person processes, stores and accesses information.

**General intelligence** seems unlinked to the development of spoken communication, though it is linked to formal classroom skills (Genesee, 1976; cf. Skehan, 1989).

**Foreign-language aptitude** has been measured since the 1950s by tests examining such areas as phonetic coding ability, grammatical sensitivity and inductive learning ability (Carroll & Sapon, 1959; Pimsleur, 1968, in Skehan, 1989). Skehan (1986) found that the aptitude measured by such tests has two main components: underlying linguistic ability (also discernible in early-childhood L1 use), and "classroom-wiseness", i.e. the ability to deal with decontextualized language. Skehan (1989: 109-110) claims that the analytic component of general intelligence also forms a sub-component of language aptitude.

O'Malley & Chamot (1990, pp. 162-163) speculate that L2 aptitude may consist of a cluster of strategic skills derived from previous **foreign-language experience**. This is backed up by Lai (1991), who found experience of even a non-cognate L3 to be significant in predicting L2 proficiency.

**Cognitive style** may be defined as one's preferred means of "perceiving, conceptualizing, organizing and recalling information" (Ellis R., 1985, p. 114ff). Its most widely-researched measure is the field-dependence↔independence cline. Field-dependent people tend to be intuitive, holistic and other-oriented in their thought processes, and field-independent people impersonal, analytic and independent. Therefore one might expect the former to benefit more from inductive learning methods (e.g. interaction and real-text input) and the latter from deductive methods (e.g. grammar presentation), but this does not appear to be the case: if anything, field-independent learners seem to perform slightly better in all contexts (Ellis R., ibid.).

As field-independent learners are by definition more independently-oriented, one advantage of field independence might be that it helps learners to work autonomously (assuming, of course, that autonomy helps learning: cf. discussion in 2.2.3 above!). If to this speculation one adds Naiman *et al*'s finding that field-independence benefits the advanced learner strongly, but the beginning learner not at all (1978, p. 67), one has another support, albeit tentative, for the hypothesis that self-instruction/autonomy only comes into its own after an intermediate-proficiency threshold.

**Tolerance of ambiguity** (the ability to cope with incomplete understanding), by contrast, was found by Naiman *et al* (ibid.) to correlate with success in listening comprehension and tolerance of the L2 as classroom language - but to benefit lower- rather than higher-proficiency learners. Indeed, low tolerance of ambiguity appeared to be a key indicator of early dropout.

Some authors group cognitive style with attitude to task in order to give the concept of preferred **learning style** (Ellis R., 1989; O'Malley & Chamot, 1990, pp. 163-164; Meara, 1993). Ellis sees learning style as an "experiential ↔ studial" continuum (learning by doing ↔ learning by studying). Meara (1993), by contrast, sees learning style as a "visual ↔ verbal" continuum. Both continua may well coexist. Ellis speculates that a "balanced" orientation may be more successful than one skewed towards either extreme; and both authors warn against teaching methods that force learners to adapt to an unfamiliar learning style (Delaney, 1978, in Meara). The key implication here is that a successful language-teaching course will have to have enough variety of activities to cope with a range of learning styles (Meara).

## 2.4.3 Strategies

### 2.4.3.a Definitions

I follow O'Malley & Chamot (1990) and Bialystok (1990) in defining strategies as potentially conscious, intentional acts aimed at making learning or communication more effective, and in distinguishing them from the largely unconscious "processes" (Bialystok, p. 15ff) of interlanguage development and language production/reception.

Of course, the boundary between the two is fuzzy (cf. Ellis R., 1994, p. 295); and conscious does not necessarily mean controllable. Carver (1984), for example, distinguishes between strategies mediated by conscious "plans" on the one hand, and unplanned problem-solving strategies deriving directly from learning style on the other; and Ellis R. (1989) implies that the latter are highly resistant to alteration. The trainability question is discussed at greater length below (2.4.3.c.iv).

A widely-accepted distinction is that between communication and learning strategies; these will be looked at separately.

## 2.4.3.b Communication strategies

These have as their aim the maintenance of communication when production or reception processes threaten to break down, whether through working-memory overload or lack of L2 knowledge (see Bialystok, 1990 for overview).

Tarone (1980) distinguishes between "communication strategies" proper and "production strategies" according to whether the interlocutor attempts to solve the problem (e.g. by supplying the correct answer) or the speaker does (e.g. by self-correction, or abandoning part of the message). Corder (1983) reminds us that communication strategies may also be receptive, i.e. geared towards listening and reading; Carver (1984) cites inferring, checking, predicting, and identifying key items as possible receptive strategies. Doyle & Meara (1991, pp. 56-57) also cite strategies that might be termed "proactive", such as asking yes/no rather than open-ended questions in order to avoid incomprehensible replies.

## 2.4.3.c Learning strategies

### 2.4.3.c.i Definitions and taxonomies

Learning strategies have been defined as learners' "attempt[s] to gain linguistic or sociolinguistic competence in the target language" (Tarone, 1980; cf. O'Malley & Chamot, 1990, p. 18),; or, more precisely, "to help them comprehend, learn or retain

new information" (O'Malley & Chamot, p. 1). Learning and communication strategy-types may overlap: thus cognate transfer might be a useful strategy both for vocabulary-learning and for overcoming communicative blocks. Moreover, if interaction with real people and texts is important or even necessary for full acquisition (cf. 2.3.3 above), then many conscious techniques which aim to increase the efficiency of this interaction could also be seen as learning strategies.

Inevitably for research trying to see regularities in the flux of human behaviour, there are several different classification systems in the learning-strategy literature (for overviews, see Oxford, 1989; O'Malley & Chamot, 1990). There is widespread agreement, however, that strategies appear to operate on at least two different levels:

★   **strategies that manage learning** (e.g. planning, evaluation): Naiman *et al*'s "strategies" (1978, pp. 13-16), Rubin's "actions that permit learning" (1981), O'Malley & Chamot's "metacognitive strategies", Wenden's "self-management strategies" (1991).

★   **strategies that tackle specific tasks** (e.g. dictionary-use, repetition): Naiman *et al*'s "techniques", Rubin's "strategies directly affecting learning", O'Malley & Chamot's and Wenden's "cognitive strategies".

Some authors make finer distinctions. Dodson (1986) distinguishes between "bilingual strategies" that compare the L1 and the L2, and "monolingual strategies" that operate in the L2 only. Oxford (1989, 1990), synthesising earlier research, makes a six-way division:                                                                                          ,

★   metacognitive strategies;

★   affective strategies;

★   social strategies;

★   memory strategies;

★   cognitive strategies;

★   compensatory strategies: strategies to overcome knowledge limitations (equivalent to communication strategies: cf. above).

Though the distinction between "memory" and "cognitive" strategies is psycholinguistically dubious, Oxford claims (Oxford & Burry-Stock, 1995) that her

taxonomy has a grounding in Factor Analysis (a statistical technique described in 5.3.4.b); and her explicit adoption of communication strategies into a learning-strategy model is intuitively appealing (cf. Carver, 1984).

Nevertheless, I will now use O'Malley & Chamot's conceptually simpler model (adopted by e.g. Barnett & Jordan, 1991) as a framework for listing individual strategy-types identified in the research literature. Authors are cited only for strategies not listed by O'Malley & Chamot; Naiman *et al's* strategies (pp. 13-16) are especially relevant in that their data-gathering technique - open-ended retrospective interviews of adults - exactly parallels that of my main study (Chapter 5). Individual strategies of no relevance to the present project, however, are omitted.

★ **metacognitive strategies:**

- active involvement in learning (Naiman *et al*)
- seeing language as both abstract system and communication means (Naiman *et al*)
- planning
- working on language every day (Naiman *et al*)
- monitoring oneself and others
- self-evaluation

★ **cognitive strategies:**

- resourcing (use of reference materials)
- using metalinguistic descriptions (Naiman *et al*)
- using paradigms, e.g. in grammar (Naiman *et al*)                '
- inventing own example sentences (Naiman *et al*)
- inferring meaning
- skimming & scanning (Barnett & Jordan)
- contextualization (of new items to aid comprehension/recall)
- grouping (of words and concepts)
- inventing language games and puzzles (Naiman *et al*)
- repetition
- note-taking, e.g. with a pocket notebook
- elaboration - using mnemonics, keyword-imagery (2.3.3.e), etc.

- transfer: use of previous information, e.g. L2 etymology, L1 cognates

- translation

- recombination (using input material to form own message)

- rehearsal (language practice before a naturalistic task)

- naturalistic/authentic practice in all four skills (Oxford, Naiman *et al*)

- focusing on fluency rather than accuracy (Naiman *et al*)

- revision (Oxford)

★ **social/affective strategies**:

- co-operation with peers

- using native speaker interlocutors, pen-pals (Naiman *et al*)

- becoming culturally aware (Oxford)

- anxiety reduction (Oxford) and encouragement

- self-reinforcement (rewarding oneself)

2.4.3.c.ii Learning strategies and success

There is evidence that learning strategy use can contribute to success in SLA. I firstly look at what absolute value strategies may have, and then at their link with individual learner characteristics.

The "good language learner" studies (e.g. Naiman *et al*, 1978; summarized by Ellis R., 1985, pp. 122-123) indicate a bundle of features linked with SLA success (cf. Stern, 1983, p. 414; Ellis R., 1989; Wenden, 1991):

1. seeking opportunities for L2 exposure and use

2. combining naturalistic with study techniques

3. having the analytical skills to perceive, categorise, store and monitor L2 features

4. being adaptable to different learning conditions

5. being aware of one's own processes of L2 learning and use

6. having strong motivation

7. being willing to take risks

8. being adult or adolescent

Of these, the first two can be seen as strategic, and features 3-5 may well develop with increasing language-learning experience.

At a more detailed level, some authors betray a preference for experiential/monolingual over studial/bilingual strategies (e.g. Carver, 1984; Oxford, 1989). The most popular strategies with learners, by contrast, tend to be studial, such as repetition, note-taking and translation (O'Malley & Chamot, 1990, pp. 116-118). This effect is especially marked with university-level modern languages students (McGroarty, 1987, in Oxford, 1989): a fact which Oxford, somewhat curiously, sees as betraying a covert learning problem (low motivation) rather than as a factor in their success!

Certain non-studial strategies, it is true, do appear to play a key role in acquisition. Bialystok found (1981) that seeking functional practice was a stronger SLA achievement factor than functional inferring and formal practice; and Wong Fillmore (1979) points out that social strategies (e.g. seeking interaction) are a necessary precondition for using strategies based on spoken communication. This does not mean, however, that studial strategies are ineffective: I am aware of no empirical evidence that any strategies may be ineffective or counter-productive per se.

The effectiveness of low-level strategies, in fact, seems to lie in being linked to the right task - e.g. keyword-imagery/mnemonics for vocabulary learning (Cohen & Aphek, 1981, in O'Malley & Chamot, p. 107; Nation, 1990, reviewed by Arnaud, 1992), or self-monitoring, elaboration and inferring in listening skills (O'Malley & Chamot, p. 131).

Moreover, multiple strategy-use appears better than a one-strategy-per-task approach. Brown & Perry (1991), for example, looking at vocabulary learning, report that starting with keyword-imagery and then going over to a naturalistic-practice ("semantic") strategy is more effective than either method in isolation (cf. discussion in 2.3.3.e). In addition, tasks are rarely monolithic entities, and may thus require different strategies as circumstances change. Thus - looking at receptive vocabulary acquisition via reading - Parry (1991) postulates that dictionary look-up and written listing (high-attention but time-consuming) is better for learning low-frequency items, whereas inference from context (low-attention but quick) is better for high-frequency items, for only the latter will be reinforced by frequent re-encounter.

Hence better learners are reported to use strategies more frequently and have a wider available range (O'Malley & Chamot, 1990, p. 128; Oxford, 1989). Poor language learners, by contrast, often use inappropriate strategies for the task in hand (O'Malley & Chamot, pp. 140-141; Vann & Abraham, 1990). Ellis R. (1989) also notes that having a narrow strategy-range can risk incompatibility with the available tuition-type. With certain strategies, however, learner ownership might be important in itself: Roberts (1995) considers that keyword-imagery is more effective if learner-generated rather than supplied by the materials writer.

We will now examine which features of the learner, the L2 or the setting might modify strategy-use.

### 2.4.3.c.iii Variables affecting strategy-use

Oxford (1989), summarising her own and others' research (cf. O'Malley & Chamot, 1990), lists variables which have been compared against learning strategy use. Amongst these are:

★ **L2 difficulty**: correlates with increased strategy-use - though better language learners may choose more difficult languages!

★ **proficiency level**: some correlations exist between increasing proficiency and strategy-range, though these may be due to greater task variation or to dropout of poorer learners; proficiency does not appear related to willingness to report strategies (Chrysochoos, 1992)

★ degree of **metacognitive awareness**: conflicting results

★ **gender**: females seem better strategy-users, though certain strategies appeal more to certain sexes

★ **attitude**: important, especially in that a positive attitude seems a precondition to strategy training

★ strength of **motivation**: correlates well with amount of strategy-use (cf. O'Malley & Chamot, 1990, p. 160ff)

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★  **personality**: intriguing linkages between university-level L2 study, inhibition, and form-based (as opposed to meaning-based) strategy-use.

★  **learning style**: under-researched, though links are intuitively highly likely (cf. Dickinson, 1987; Doyle & Meara, 1991: the latter, for example, see imagery and rehearsal strategies as being more suited to "visual" and "verbal" thinkers respectively)

★  **language aptitude**: less influential than attitude, though not well researched

★  **teaching method**: as time goes on, there is increasing convergence of student strategies to those "subtly suggested" by the method, though learners may continue to use "traditional" analytic strategies in communicative lessons (cf. learning style discussion in 2.4.2.d above)

★  **task**: more advanced students fine-tune their strategies more precisely to the task in question (cf. discussion in previous sub-section; O'Malley et al, 1985, also note that strategies do not help with over-difficult listening texts)

To Oxford's list one might add:

★  the **classwork/self-instruction** dichotomy has not been found to affect strategy preference (O'Malley & Chamot, 1990, p. 122) - a useful guarantee for the applicability of classroom-based strategy research to the present project

★  **experienced** language learners (those who have already studied other L2s) show more sophisticated strategy-use than novices (O'Malley & Chamot, 1990, p. 140; cf. Lai, 1991)

## 2.4.3.c.iv Strategy training

There is a recent but growing body of empirical evidence that many learning strategies can be successfully trained (e.g. O'Malley et al, 1985; Wenden, 1991; Victori & Lockhart, 1995; Fernández Toro & Jones, 1996). This has been paralleled by the publication of practical training activities for both communication and learning strategies (e.g. Willems, 1987; Oxford, 1990; Barnett & Jordan, 1991; Ellis G. & Sinclair, 1989).

Research into strategy-use and SLA success (see above) indicates that the aim of training should be to extend the range and appropriacy of use (O'Malley & Chamot, 1990, p. 160; Doyle & Meara, 1991, pp. 35-36) rather than to replace existing strategies. Training may meet with student resistance (O'Malley & Chamot, p. 184); on the other hand, L2 tuition which assumes strategies which the student does not have is also likely to present considerable barriers to learning (Ellis R., 1989). Thus Oxford (1989) stresses that any training programme must take the learners' existing strategies as a starting-point, and must take account of their underlying characteristics and learning goals.

Barnett & Jordan (1991) see strategy awareness-raising as especially vital in autonomous learning - too vital, in fact, to be left to chance. Among the activity ideas they suggest are:

★   attending tutorials and group discussions

★   filling in needs-analysis and learning-strategy questionnaires

★   reading newsletters, slogans, messages and questions

★   writing study plans and learner diaries.

To this Doyle (1991) would add the use of books and live broadcasts in awareness-raising. In addition, a good number of Oxford's class-based strategy-training activities (1990) could well be used for training self-instructed learners - especially within the seminar format suggested by Barnett & Jordan[4].

## 2.4.4 Summary and implications

Language learning appears helped by factors such as: strong motivation, a positive attitude towards the target culture, language aptitude/experience, and tolerance of ambiguity. Less clear advantages are: female gender and a field-independent cognitive style. Age, degree of extroversion/introversion and learning style may lead learners to react differently to various teaching settings and styles. Many learning strategies have

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[4] As strategy training is only peripheral to the present study, Oxford's excellent and wide range of activities will not be presented here.

been identified in the literature; appropriate and flexible use of learning strategies is linked to SLA success, and a good number of strategies seem to be trainable.

Two of the three studies in this project (the Diary Study and the Language Experience Survey: Chapters 4 and 5) look at individual learners and their learning processes and strategies: hence all the individual learner characteristics discussed here are relevant (apart from age, which is held constant). The lack, however, of external tests for personality, etc. means that many individual characteristics are examined not systematically, but as and when learners regard them as important enough to be cited. As learning-strategy use, by contrast, is felt to be of crucial importance to self-instruction, it is a major focus of both studies: thus strategy data is explicitly elicited and examined in detail.

Having looked at the processes of self-instruction and of SLA in general, and at what the learner brings to the process, I will now turn to the role of materials in self-instruction.

# 2.5 Materials and Activities for Self-Instruction

This section focuses primarily on self-instruction packages, i.e. the teach-yourself paradigm, for it is here that externally-produced materials have most effect on the learning process. Some discussion, however, may also be applicable to the design of worksheets, etc. for autonomous learners in language centres.

## 2.5.1 Methods

Theories of SLA have usually generated their own "methods": all-embracing models of what should be learned, and how (see Richards & Rogers, 1986 and Howatt, 1984 for overviews). Swaffar *et al* (1982) point out that, in classrooms, methodology is less a question of excluding certain activities and skills than of giving them different priority, for the purpose of all language-teaching methods is the same: to bring learners to a near-native ability to handle the L2. In teach-yourself courses, however, the effect of methods may be more marked, for whole domains of language learning may be considered as outside the responsibility of the package.

The three methods most typically found in teach-yourself courses are grammar-translation, audio-lingualism, and some form of communicative approach.

### 2.5.1.a Grammar-translation

Grammar-translation aims to build up the underlying lexicogrammar, through a combination of grammar explanations, translated vocabulary lists, and grammar-manipulation and translation exercises; oral work is seen as lying outside the province of the coursebook, in real life (if at all). Its most intriguing aspect, perhaps, is its resilience in the face of a century's lambasting by methodologists (from Jespersen, 1904 onwards: cf. Howatt; Richards & Rogers). Factors in its survival may be ease of learner use (Windeatt, personal communication), and clarity of L1-mediated knowledge

structures (cf. Dodson, 1986). These two features seem especially important to the lone student - indeed, self-instruction might well have been a factor in grammar-translation's longevity.

Certain post-communicative developments (see below) have recently begun to echo grammar-translation's concerns: cognitive and "consciousness-raising" approaches (Rutherford, 1987) have made grappling with linguistic form once more respectable, and even translation seems to be making a comeback (e.g. Duff, 1989).

### 2.5.1.b Audio-lingualism

Most critique of audio-lingualism - typified by language-lab based repetition and substitution work on grammar paradigms - has focused on its concentration on the automatization of syntax with little concern for realistic language use. It probably also failed to satisfy student wishes for high-density, explicit input, especially in the key area of lexis (cf. Jones, 1992). Audio-lingualism now finds itself almost totally discredited, mainly through the realisation that realistic practice is vital, and that more aspects of language than grammar and phonology should be taught in structured terms. Nevertheless, recent research into holophrastic learning and the effects of practice (2.3.2.d) suggests that some audio-lingual activities - the repetition of dialogue chunks (the Linguaphone method: see Table 3.1.3/i for titles), for instance, or the use of modelling techniques (Gagné, 1985, in O'Malley & Chamot, 1990, p. 31) - may be ripe for rehabilitation.

### 2.5.1.c "Proto-communicative" methods

From the late 1970s onwards, communicative methods (Littlewood, 1981; Richards & Rogers, pp. 64-86) tried to compensate for their predecessors' over-emphasis on language as form and low-level automaticity with an equally one-sided stress on language as interaction (Wilkins, 1976; Johnson, 1982). The communicative movement's realization of the multiplicity of language structure, however, and its stress on realistic practice inspired great creativity in activity design terms.

**2.5.1.d "Post-communicative" methods**

Richards & Rogers (1986) point out that different methods should not be judged as better or worse per se, but as promoting different skills areas and knowledge-types. But if objectives are wide-ranging - as is often the case, especially at beginner level - an "informed eclecticism" may well be advisable (ibid.; Doyle & Meara, 1991, p. 40): thus Roberts (1995) found "eclectic" teach-yourself courses to be more effective than "single-method-driven" courses (cf. 2.2.2 above). Eclecticism also has SLA research backing, as discussed above: not only do learners' approaches to learning vary according to factors such as learning style, personality, setting and previous language knowledge (all of which could not be coped with by a single-track teaching approach), but learning appears to work most efficiently with a four-way combination of form- and function-based activities on input and output.

The latest "post-communicative" generation of classroom courses (e.g. Swan & Walter, 1984; Soars & Soars, 1991) can be said to have eclecticism as its underlying method. Nevertheless, everything has its disadvantages: having a wider variety of texts and activities might make for an interesting course that is well grounded in linguistic and learning theory - but also runs more risk of being confusing and unwieldy to the learner.

But it is now perhaps best to leave the realm of abstract debate, and to look at the practicalities of materials design in self-instruction.

## 2.5.2 Materials design and evaluation processes

**2.5.2.a Design processes**

The following idealised self-instructional materials design process is based on Rowntree & Connors (1979), with input from Hutchinson (1987) and Sheldon (1987):

**Planning**

modelling learner needs, identity, setting ⇨

reviewing source literature ⇨

deciding overall aims ⇨

identifying constraints ⇨

selecting content ⇨

devising behavioural objectives ⇨

deciding sequence ⇨

estimating student workload

⇩

**Writing**

exercises ⇨

explanations

⇩

**Evaluating**

subjective evaluation ⇨

observer-monitored trial ⇨

field trials, under distant conditions ⇨

continuous monitoring during real use

## 2.5.2.b Design criteria

To turn now from process to product, factors the designer and evaluator need to take into account, according to Rowntree & Connors (1979) and Roberts (1995), are:

- assumed starting knowledge & characteristics of target group
- content and structure (chapters, index, etc.)
- pedagogic features (method, learning timescale, enjoyability)
- breadth of coverage
- adequacy of linguistic and communicative analyses
- technical quality
- size, cost, etc. (cf. Doyle & Meara, 1991, p. 174)

Dougill (1987) gives four overall desiderata for L2 materials in general:

- "face validity" (clarity of aims)
- "generative push" (ability to enable learners to generate language outside the course framework)
- "coherence"
- "affective depth" (ability to "touch the inner person")

whilst Dodson (1990a) stresses:

- balance between medium- and message-orientation

and Doyle & Meara add:

- cultural content

At a more detailed level, Rowntree & Connors and Roberts stress:

- no basic errors
- clear, logical structure
- proper explanation of aims and content
- relevant, clear, simple instructions and language explanations
- clear tests, related to input

Dougill (1987) asked L2 teachers to rank coursebook desiderata in terms of importance. The following (ranked) features are relevant to self-instruction:

1. intrinsically interesting
2. generating discussion

3. varied in subject-matter

4. having useful practice activities

5. having meaty texts

6. clear

7. systematic

8. attractive

Sullivan (1990) found that (teenage) learners, by contrast, liked their coursebooks to have:

- illustrations (which their teachers did not rate highly)

- clear metalinguistic explanations (ditto)

- language games, quizzes, crosswords (ditto)

- cassettes

- practical, everyday communication models (dialogues) and practice activities (role-plays)

- immediate feedback

- L2 culture information

- translated vocabulary reference lists

Demotivating were:

- controlled exercises and drills

- separate grammar sections

- formal tests

Such catch-all lists are too detailed, however, for prospective learners browsing in a bookshop. Here Doyle & Meara (pp. 174-175) recommend two key guidelines:

- relate the price to what one wants from a course

- read the introduction & contents pages carefully

## 2.5.3 Design in practice

I now focus on individual aspects of language-teaching materials design, with special reference to self-instruction.

**2.5.3.a Delivery means**

I first look at the physical forms that can be used in self-instruction - beginning with the structure of the teach-yourself package.

<u>2.5.3.a.i Teach-yourself packages</u>

I see a teach-yourself package as being made up of one or more "components": coursebooks, audio-cassettes, videos, reference guides, etc. It is usually possible to distinguish between a **core component,** which carries the main learning information and activities, and **secondary components.** The core component is usually a coursebook, though two or more mutually dependent components could combine to make the core, e.g. coursebook and video/CALL software. A completely non-paper core (e.g. an audio cassette or a CD-I disk) is possible in principle, but I know of no real-life instances. Though secondary components serve to back up the core, they may sometimes also be independently usable (e.g. pronunciation tapes). Both will be discussed in detail below.

An important issue is the claimed and actual **scope** of the package. Some packages may focus only on a sub-area of language (e.g. pronunciation); but many, especially at beginner level, aim to give an all-round grounding in the language.

The latter is often used by publishers as a selling point. Their "all you need is there" claims, however, are identified by Hayet as a pernicious "mythology" (1990/91: see 2.2.2 for other publisher "mythologies"). For, as several authors urge (besides Hayet: Dickinson, 1987; Doyle & Meara, 1991), the fact that no self-instruction package can supply interaction with others means that, if learners are to survive, they must look outside the package, developing strategies of self-reliance, and contacting fellow learners and/or native speakers. This crucial issue is examined in 2.6 below.

Choice of medium can be affected by **cost and equipment** constraints. While books are "good value for money" (O'Neill, 1982, in Sheldon, p.3), adding cassettes (essential, according to Doyle & Meara, 1991) can easily double the cost; and other media (e.g. videos, CALL software) tend to be even pricier. Purchase prices for similar physical media can also vary sharply, however, and appear unrelated to technical or pedagogic quality: surveying cassette-based teach-yourself packages, Roberts (1995) found most

of the "expensive" courses (£60-£130 at 1989 prices) "severely dated" and many involving "almost certain drudgery", whereas the £20 BBC courses were judged good value for money (Consumers' Association, 1990). Cunningsworth (1984, p. 78) points out that some media (e.g. computer software) demand physical equipment which might not be available in many homes.

Roberts also found that the **house style** of a publisher or series was a major influence on an individual package's approach, organisation, materials quality, syllabus and content.

2.5.3.a.ii The coursebook

As already mentioned, the core component almost always consists of a paper coursebook.

Several authors (e.g. Rowntree & Connors, 1979, pp. 290-291; Ellis M. & Ellis P., 1987; O'Sullivan, 1988; Roberts, 1995) point to the importance of good **physical design**. Besides the practical characteristics of portability, physical quality (e.g. binding), etc., intrinsic attractiveness and visual appeal serve not only to motivate, but also to "sell" the course. Good visual design (Ellis & Ellis) makes a coursebook more accessible to the reader, e.g. by identifying the target learner group (business and holiday courses, for example, will usually have different visual design features), or by stressing the organisation, relevance or sequence of the various items. Here O'Sullivan warns against too "busy" a page, which can be as off-putting as a dull one. As for illustrations, they may not be merely decorative, but may also exemplify, provide stimuli for activities, etc.

The coursebook is often prefaced with an **introduction** stating aims, etc. Sheldon (1987) notes not only that the aims are rarely specified in enough detail, but also (and more crucially) that there is often a "credibility gap" between claims and actual activity practice (cf. Hutchinson, 1987).

Activities are usually grouped into **"units"**, often with sub-sections devoted to each of the lesson phases (presentation, formal practice, functional practice, etc.: see 2.5.3.d below). Dougill (1987) and Cunningsworth (1984, pp. 78-79) ask of coursebook units:

- how long they are
- whether they show clarity of purpose
- whether there is enough presentation/input, "practice", and free, meaningful, and personalized production
- what the balance is between the conflicting needs for variety and predictability
- whether the pace is adequate

Dougill also asks if there are **test units,** to which one might add special revision units. Reference sections are discussed in terms of learner support in Sub-Section 2.6.2.a below.

### 2.5.3.a.iii Secondary components and autonomous materials

Examples of "secondary" components are audio and video recordings (Cunningsworth, 1984, p. 78), discrete reference materials (Sheldon, 1987), workbooks, and CALL programs (computer-assisted language learning - e.g. Kenning, 1996). Magnetic and paper texts and reference materials may also be autonomous, i.e. independent from any course package. Insofar as fully-autonomous learning makes use of "materials" proper (as opposed to real interaction and off-air/live listening and viewing), it will probably be reliant on such autonomous materials - though package materials may perhaps sometimes be used on a one-off basis, i.e. without following the package syllabus.

**Audio** recordings may contain lab drills or listening passages (Dougill, 1987); with the latter, see 2.5.3.e below for a discussion of the rival criteria of clarity and authenticity. Roberts (1995) found his expensive home-study courses highly reliant on cassettes - which were, however, very varied in terms of technical quality and naturalness of spoken text. In addition, the language variety was not always suitable for the target audience - e.g. Latin-American Spanish for British customers.

The ability of **CALL** programs to generate attractive exercises and activities with instant feedback makes them potentially very useful in self-instruction (Kenning, 1996), though Jones (1991a) warns that technological razzmatazz may conceal a lack of linguistic or methodological substance.

Besides traditional CALL programs, other **information technology** applications may soon come to play a role in L2 self-instruction (Kenning; cf. Fox *et al*, 1992). For example:

- multimedia (Darby, 1992) and interactive video
- CD-ROM dictionaries can be a useful reference and even learning resource (e.g. the stroke-order guides in *Multimedia Chinese-English Dictionary*)
- Internet courseware
- electronic mail can enable communicative writing between learners of the same or each other's languages (Soh & Soon, 1991)

Hayet (1990/91) even proposes setting up a "virtual classroom" where learners would be able to use networked computers to access learning materials, to communicate with each other, and to get feedback from teachers/advisors. Unfortunately, the development costs involved in virtual classrooms - especially in view of the terrifyingly rapid obsolescence of computer technology - would be so high that they are unlikely to pose a threat in the foreseeable future to the centuries-old, vastly cheaper coursebook-centred model of self-instruction. In any case, a decade and a half of CALL software production, during which time personal computer ownership has stabilised at a relatively high level, seems to have had only a peripheral effect on self-instruction as a whole - a picture which the most recent technical advances are unlikely to change.

A similar growth in **video** over the same time-span, however, seems to have had much more impact on self-instruction - probably because of the potential for off-air-copying and the intrinsic enjoyability of feature films and broadcast programmes. Video recordings, whether package components or autonomously-chosen authentic texts, have the advantage of offering visual and contextual cues for presentation and listening comprehension activities (Willis, 1983). Other activity ideas may be found in the classroom video literature (e.g. Lonergan, 1984; Allen, 1985).

Both audio and video may offer simulated interaction exercises, where the learner has to converse with a recorded interlocutor. Hayet (1990/1991) rightly points out that the latter is hardly a substitute for real interaction, though her blanket condemnation of such activities seems somewhat exaggerated.

## 2.5.3.a.iv Do-it-yourself materials

The acquisition value of personalised input and output (2.2.3) suggests that the best materials may be made by the learners, using authentic text of interest to themselves. Doyle & Meara (1991) suggest a number of home-made activities, such as:

- reading (e.g. comics) for pleasure

- using a mail-order catalogue to make vocabulary flashcards, to search for words beginning with a certain letter, or to decide on 20 essential items for a certain expedition

In full autonomy, many learning activities will have a relatively small studial element: extensive immersion in authentic texts, or real-life interaction, perhaps with mental or paper noting of vocabulary or usage points. For more structured work on language form, the learner will either be reliant on self-designed activities, or - if a member of a language centre - on **worksheets**. These may take two forms. Some may be text- or language-area-specific (e.g. advanced grammar points). Many, however, will be generic, i.e. usable with any text (see e.g. Fernández Toro, 1994, for video).

## 2.5.3.b Objectives

Objectives may be defined as desired changes in the learner's knowledge-state[5]. Dickinson (1987, pp. 80-81) maintains that, with self-instruction, the objectives must be explicitly stated (e.g. in a introductory section) if the learner is to take informed decisions.

Objectives are frequently described in terms of **linguistic content**, i.e. items of knowledge to be transmitted. Cunningsworth (1984, pp. 75-77), suggests a threefold division of L2 content objectives:

- form: phonology, grammar, lexis and discourse

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[5] I do not distinguish between "aims" and "objectives": like most instruction practioners, I suspect, I find definitions that separate the two not only artificial, but also extremely forgettable.

- function - including appropriacy,

- interaction - including instruction in e.g. implicitness and communication strategies (cf. Cunningsworth, 1987; Willems, 1987).

Linguistic content will often be modified by **varietal factors** (Cunningsworth, 1984, p. 75; 1987) such as style (formal↔informal), regional variation, and register (role-specific language).

Choice of linguistic means, in fact, cannot be seen outside the whole sociocultural matrix (Halliday, 1978). Thus one must also ask whether the L2 **culture** is sidelined, whether it is merely a setting for language practice, or whether it is a content aim in its own right (Cunningsworth, ibid.; cf. Byram, 1988; Barro et al, 1993). In the eight expensive home-study courses he focused on, Roberts (1995) found that cultural information varied between "quite good" and "absent".

In a single-level course, adequate **coverage**, especially of core lexis and grammar, is a key criterion (Meara, unpublished; Doyle & Meara, 1991, p. 38). Roberts (1995) found target vocabularies in his course packages ranging from a clearly inadequate 400 words to a "serious" 2000 words (Doyle & Meara, p. 37; cf. the lexical threshold discussed in 2.3.5). A similar pattern emerged for grammar; but all "communicative analysis" was lacking.

Content becomes action through the so-called **language skills**: the familiar quartet of reading, writing, listening and speaking (Cunningsworth, 1984, p. 75; cf. Stern, 1983, p. 348), to which one might add the visual channel of doing and seeing (Willis, 1983). A course may aim at an undefined "global" L2 ability or may focus on certain specific skills (Sheldon, 1987). Roberts (1995) found much more focus on listening and speaking than on reading and writing in all his home-study courses.

Another question is whether skills are taught as whole entities or split into **sub-skills** (Sheldon) - in reading, for example, this would involve such aspects as script recognition, "scanning" for specific information, "skimming" for gist, etc. Conversely, one may ask whether **integrated-skill** activities occur (Cunningsworth, 1984, p. 75) - for example, listening as input to writing. Linked to this is the question of whether items, rules and skills are presented and practised as tools for communication in

real-life settings, or whether they are treated as isolated, decontextualised articles of knowledge. Here Roberts found wide variation in his eight teach-yourself courses.

**Specificity of learner group** - the general↔LSP (language for specific purposes) cline has major implications for both linguistic and interactional content (Sheldon, 1987). Nation & Hwang (1995), however, argue that - in terms of lexis, anyway - an LSP focus only makes sense once the 2000 word-family common core has been mastered. At this point full autonomy might well become an alternative to package-led work (cf. discussion in 2.3.5 above).

Finally, one might mention "enabling" or "process" objectives, such as acculturation (Schumann, 1978), training in learning strategies (2.4.3.c.iv), or personal development (Moskowitz, 1978).

## 2.5.3.c Syllabusing

I define a syllabus as a system that specifies how the content of a course is sequenced. Sequencing may be linear, or cyclical, i.e. with the same areas being returned to at intervals in the course (Cunningsworth, 1984, p. 76; Breen & Candlin, 1987; Dougill, 1987).

**Revision** has been identified as crucial to the learning process. Thus a syllabus may be interrupted by special revision units, and/or individual items may be recycled in subsequent units (Rowntree & Connors, 1979, pp. 132; Breen & Candlin). Nation (1990, reviewed by Arnaud, 1992) claims, however, that most coursebooks provide alarmingly little repetition of key vocabulary.

Syllabus **gradient**, i.e. the rate of new input relative to practice opportunities, may well be a key factor in self-instruction: Doyle & Meara (1991, pp. 115-116) mention vocabulary and grammar overload as a major predictor of course drop-out.

Syllabuses may be classified into various **types** depending on the aspect of language used as overall organizer (Johnson, 1982, p. 55ff). Thus both grammar-translation and audio-lingualism use:

- structural syllabuses, which are organised by a sequence of grammatical structures (Cunningsworth, 1984, pp. 75-76; Crookes, 1986, p. 20)

Common alternatives are:

- functional syllabuses - organised by communicative function (Cunningsworth)
- notional syllabuses - organised by semantic categories (Wilkins, 1971, 1976; Crookes)
- lexical syllabuses - organised by word frequency and utility (Willis, 1990)
- situational syllabuses - organized by cultural setting

Johnson (1982, p. 92) points out that using one aspect of language to organize learning as a whole inevitably disorganises the rest. Therefore he proposes (pp. 66-69) a "multi-dimensional" syllabus, where each language area has its own syllabus strand. This approach has been widely adopted by the present post-communicative generation of (EFL) coursebooks (e.g. Swan & Walter, 1984, pp. iv-v; Soars & Soars, 1991), with each unit incorporating the four skills, lexis, grammar, phonology, etc. within a broadly situational framework (e.g. transport, or making friends).

## 2.5.3.d Learning tasks

### 2.5.3.d.i Introduction

Definitions of tasks abound (see Crookes, 1986); here I adopt Crookes' hearteningly straightforward formulation: "a piece of work or an activity, usually with a specified objective" (p. 1).

A familiar division is that between **presentation** and **practice** tasks (Richards & Rogers, 1986), with the ratio between them being a crucial evaluation criterion (Cunningsworth, 1984, p. 77). Presentation may be glossed as activities aiming at the input and structuring of new knowledge, and practice as activities aiming at hypothesis-testing, proceduralization and automatization (see 2.3.2.d for details). Cognitive learning theory, however, also implies a possible intermediate stage: that of **memorisation**, or activities aimed at fixing input in long-term memory. In addition, an

important final phase is that of **feedback** activities. All will be discussed in detail below.

Practice activities may focus on discrete language topics (e.g. passive voice) or sub-skills (e.g. listening for gist), or they may practise overall language use - though these are almost certainly two ends of a cline rather than mutually exclusive categories. Various labels are given to this cline, depending on the author's priority. Thus the traditional **"controlled↔free"** cline is materials/teacher-focused; the **"formal↔ functional"** (Faerch & Kasper, 1983, in Ellis R., 1985, p. 175) and **"medium-orientated↔message-orientated"** (Dodson, 1986, 1990b) clines are language-focused; and the **"skill-getting↔skill-using"** cline is learner-focused (Rivers & Temperley, 1978).

As for which type should come first, cognitive "stepping-stone" views of practice seem to advocate a controlled→free progression (2.3.2.d). Brumfit (1979) points out, however, that free-communication activities may equally well be used as diagnostic or warm-up tasks before a medium-orientated feedback/presentation phase.

2.5.3.d.ii General task criteria

Cunningsworth (1984, pp. 76-77), evaluating classroom L2 materials, asks whether tasks are:

- related to previous learning
- meaningful
- systematic
- representative of the rule
- appropriate to context

Dickinson (1987, p. 81ff) also asks whether (L2 self-instruction) tasks are:

- workable without a teacher
- sufficient in quantity
- varied and flexible enough to cater for different learners' interests and learning styles (plus their feelings and perceptions: Breen & Candlin, 1987)

O'Sullivan (1988) adds the importance of:

- continuity between tasks

- personalised tasks, where learners can draw on their own experience, opinions and feelings

Rowntree & Connors (1979, pp. 178-180) add detailed advice for self-instruction task designers, such as:

- beware using trivial or skippable exercises - in case the learner skips crucial ones
- state explicitly how and why exercises are to be used
- state whether answers are to be given in speech or writing
- give recommended times
- integrate answers into the main text, separated typographically

Roberts (1995) adds the important factor of enjoyability. He found wide variability here in his home-study courses; though individual likes and learning styles play an important role, some judgements are more absolute - e.g. "it is difficult to see how anyone could find classical Audiolingualism fun". Instructions, by contrast, he found generally adequate for the complexity of the task.

### 2.5.3.d.iii Presentation tasks

Presentation tasks used in self-instruction can be arranged along a **deductive↔ inductive** (transmission↔discovery) cline (Cunningsworth, 1984, p. 76; cf. Zhou, 1992, and discussion in 2.3.3). A typical deductive presentation might involve translation, L2→L1 glossaries or L1/L2 explanation, whilst at the inductive extreme we have unmediated immersion (e.g. *Accelerated Learning*: Roberts, 1995). Illustrations, summaries (in L1 or simpler L2) or guiding questions (cf. Dickinson, 1987, p. 81) can be seen as nearer the middle of the cline.

Sheldon (1987) claims that the **metalanguage** of language explanations often assumes too much linguistic knowledge from the learner. Rowntree & Connors (1979, p. 34), discussing self-instruction courses in general, recommend using as a simple as possible a metalanguage for both explanations and instructions.

One effect of the century-long attack on grammar-translation methods (Kelly, 1969; Howatt, 1984) has been a prejudice against **bilingual** (i.e. L1-mediated) presentation:

thus coursebooks may abandon L1 grammar explanations and L1→L2 reference vocabulary lists without putting anything in their place (Meara, unpubl.). This is probably doing the learner a grave disservice: Dodson (1986) claims that intake from contextual guessing is too hazy to be stored efficiently and recycled accurately, giving rise to pidginised rather than full L2 forms; and learners find coursebooks without L1→L2 vocabulary lists unusable for reference (Rivers, 1983; Meara).

**Translation** can be used as a vehicle for presentation or practice, or may even be taught as an L2 skill in its own right (Jones, 1995a). A common argument against translated presentations (e.g. through fully-translated texts or translated word-lists) is that they encourage the "illusion" of one-to-one lexical equivalence. Even traditional methods of recording lexis (e.g. bilingual word-lists), however, allow for one-to-many or overlapping structures of lexical equivalence. And if L1-L2 contrast is integrated with effective dictionary-use strategies (exploring word-families, checking by two-way look-ups, etc.: cf. Béjoint & Moulin, 1987) and the recording of contextualized holophrases, it is probably a highly effective presentation means.

## 2.5.3.d.iv Memorisation

Opposition to bilingual methods in L2 learning has often been coupled with a general anti-cognitive bias. Though this bias is fast eroding with the advent of post-communicative methods (2.5.1.d), the use of conscious memorisation techniques still has to gain respectability in many quarters - again in the face of their widespread use by learners (cf. strategies discussion 2.4.3.c.ii).

In practice, some packages do realise the importance of memorisation: Roberts (1995) reports that several of his more expensive home-study courses have mind-maps, rhymes, drills and dialogue repetition, or keyword-imagery as the core of their method. These are initial visual/acoustic techniques, however: what such courses lack is the message-focused, semantic-processing work important for longer-term retention (Brown & Perry, 1990: see 2.3.3.e, 2.4.3.c.ii). No courses are reported that combine visual/acoustic with semantic methods of internalisation, as learning research recommends (ibid.; cf. cognitive models: 2.3.2).

2.5.3.d.v Formal practice

SLA research (2.3.2.d, 2.3.3.a) indicates that decontextualised formal practice may be of little help in acquiring complex, high-level skills such as message formulation or L2 grammar. Modelling (repetition) may help, however, with low-level or implicit/ automatised skills such as pronunciation or building up speech rate; and formal manipulation may well form a manageable stepping-stone to more functional practice.

Controlled activities may also help memorisation (Willis, 1990, pp. 72-73), and provide self-assessment (see 2.5.3.d.vii below for detailed discussion). The latter is the traditional role of **translation exercises**. To counter the notorious risk of becoming fixated on low-level equivalence problems, recent authors (e.g. Widdowson, 1978; Tudor, 1987; Duff, 1989; cf. Jones, 1995a) recommend using translation activities which take account of the whole speech event, not just the lexicogrammar - indeed, they see translation exercises as not only providing learner feedback, but also a valuable contrastive insight into how the L2 works.

The most common controlled-practice activity involves formal manipulation    of decontextualised sentences - the traditional "grammar exercise". Formal manipulation, however, may also be set in a **simulated communicative** framework (Willis, 1990, p. 58; cf. Johnson, 1982, pp. 128-134), thus stressing the links between form and function - e.g. "order these items from the waiter" as a means of practising vocabulary (Baer *et al*, 1977, p. 15).

2.5.3.d.vi Functional practice

Message-oriented/functional tasks, whether real-life or simulated, appear crucial at some stage in an activity cycle if fluency is to be achieved (2.3.2.d). Communicative models of language learning have spawned an enormous variety of such activities; which can perhaps best be described in distinctive-feature terms (Jones, 1991b).

To list but a few features: message content may be personalized (Campbell & Kryszewska, 1992); it may be derived from course input, as with comprehension questions (Widdowson, 1983); and/or it may be generated through assigned roles (role-play/simulation). The outcome may be open-ended (e.g. free writing) or closed-ended

(problem-solving); and game elements may or not be present. Mode may be written or spoken; activities may involve real interpersonal interaction (the classical "communicative" activity: Littlewood, 1981), simulated interaction (e.g. with an audio/video tape), or (as with writing tasks) be meant for the learner's eyes only. Communicative practice may even be bilingual, e.g. translating and interpreting projects and role-plays (Jones, 1995a).

2.5.3.d.vii Assessment and feedback

Summative assessment (a hurdle-type test, often certificated: Rowntree & Connors, 1979, p. 237; Dickinson, 1987, p. 137ff) may be a motive or a final outcome of a self-instructed L2 course.

In the majority of cases, however, formative feedback (assessment providing information for the learning process: ibid.) is likely to be more important to the self-instructed learner (Dickinson; cf. Cunningsworth, 1984, p. 78). Indeed, a feeling of progress seems to be an important motivator in learning, especially in the absence of extrinsic motivators such as the routine of a regular lesson or the social dynamics of a class; but without teacher feedback, progress can be difficult to gauge (Doyle & Meara, 1991).

One advantage of a learning package is that one can evaluate progress in terms of pages covered (Sheldon, 1987). Record-keeping is judged by Carver (1984) and Dickinson (pp. 185-186) as important in gauging progress - especially, perhaps, in autonomous mode, when one cannot count pages covered. Whether many fully-autonomous learners would be prepared to put in the effort required for the techniques they suggest (e.g. learner diaries) is doubtful, however.

Looking at testing proper, discrete items are relatively simple to assess in self-instructed mode: by gap-filling, say, multiple choice (Rowntree & Connors, 1979, p. 268ff), transformation exercises, or translation (see above). An answer key is essential (Dickinson, p. 82). Roberts (1995) found a strong reliance on discrete-item feedback in his self-instruction courses, especially (given the predominance of audio cassette courses in his sample) on the stimulus→ learner-response→correct-response pattern.

It is more difficult to get feedback on open-ended tasks in self-instructed mode. Windeatt (1981) mentions that the coursebook can provide model answers for writing tasks, and that transcripts can be used to check performance in listening. Dickinson and Doyle & Meara (1991) give ideas for getting feedback and gauging progress which go beyond the confines of the coursebook, such as:

- discuss one's writing with "study buddies" (fellow learners) or groups

- rate one's achievement of communicative objectives, e.g. asking the way (if a native speaker is available)

- gauge comprehension of texts by writing a reply which is checked by a native speaker

- using a similar text each time (e.g. the same column in a newspaper), make a random cloze test, count unknown words, or time reading speed at regular intervals

- translate a video dialogue and then compare the translation against the subtitles

- write a text and correct it at a later date

An important but often-overlooked question is what is done with the results (Dickinson, 1987, p. 39; Rowntree & Connors, 1979, p. 268ff): are errors analysed, and do the course materials allow for remedial action? Differential learner advice, for example, can be tied to different multiple-choice responses or overall score bands (Dickinson, p. 83).

### 2.5.3.e Text and authenticity

L2 text is essential for modelling and learner manipulation. Though it may consist of isolated sentences, recent discussions usually imply longer stretches of integral text.

A central concern has been whether the text is **authentic** (Cunningsworth, 1984, p. 78; Dickinson, 1987, p. 68; Clarke, 1989). This is generally taken to mean that it was produced by and for native speakers, i.e. not specially scripted for language-learning purposes (*pace* Breen, 1985). Clarke warns against uncritical use of authentic text: though it provides real-life language, this does not necessarily mean that the learner's

task itself (e.g. overhearing a recorded conversation) is realistic; and scripted text often gives a more generalisable model for learner output.

The consensus view seems to be that both authentic and scripted text should be subject to similar selection criteria, i.e. suitability for the activity purpose and the learner's proficiency-level and interests (Clarke; Cunningsworth), with the provision of variety being an additional factor (Dubin & Olshtain, 1986, p. 150).

## 2.5.4 Summary and implications

There is, it seems, a rich and practically-based store of advice on language-teaching materials design, much of which is directly applicable to self-instruction. This advice, however, has been applied but patchily to teach-yourself courses.

The present project aims to give self-instruction materials design a much firmer empirical base - by longitudinal and cross-sectional surveys of learner needs, strategies, and materials-use (Learner Diary, Language Experience Survey: Chapters 4 and 5), and by detailed analysis of a more representative sweep of teach-yourself packages than has thus far been carried out (Packages Checklist: Chapter 3). These surveys, coupled with the recommendations from the literature, should supply a comprehensive set of guidelines for teach-yourself package reform, as well as providing input to the training of autonomous learners (Chapter 6).

# 2.6 Managing and supporting self-instruction

This section looks beyond the role of the package to the whole issue of how solo learning is to be managed and supported. If a learning package is used, it bears a heavy responsibility here (Dickinson, 1987, pp. 38-40, 80ff); but in both teach-yourself and fully-autonomous mode, other people and the learner herself have a key role to play.

## 2.6.1 Preparing for self-instruction

Dickinson (1987, pp. 121ff, 164-166) sees good preparation for self-instruction as important in avoiding early failure.

**Needs analysis,** whether formal or informal, is an important first stage in the process of setting objectives, outlining a study strategy, and finding appropriate materials. Dickinson (p. 38) recommends the use of questionnaires here.

With non-beginners, some degree of **proficiency self-assessment** might be needed. Though learners are claimed to give accurate self-assessment ratings on a 3-band descriptor scale (beginner, intermediate, advanced: Naiman *et al*, 1978: pp. 6-7), adding more bands can give differences between teacher and learner ratings (Raasch, 1980; Windeatt, 1981; Jafarpur, 1991; Blue, 1994). Therefore discrete-item tests or questionnaires might be better for exact placement (Windeatt). In self-instruction, however, better ownership of learning might be achieved by following the learners' self-ratings, whatever their fit with externally-observed "reality"!

The aims of **methodological preparation** would be to teach learning strategies, time organization and language awareness, and to help learners make an informed choice from the range of media and activities available (Dickinson, p. 126ff; Doyle, 1991; Doyle & Meara, 1991). Wenden (1991), for example, sees strategy training as the key to learner autonomy.

One aim of **psychological preparation** would be to balance a concern for accuracy with a willingness to take risks in real-life use; another would be to highlight the importance of motivation (Dickinson, pp. 125-126; Doyle; Doyle & Meara). On the one hand it can mentally prepare the learner for what is inevitably a highly-demanding project, where progress may be difficult to judge, where rewards may be more long-term than short-term, and where contact with fellow learners and opportunities for interactive speaking may be hard to find (Doyle; Hayet, 1990/91). On the other hand, it can stress the rewards and enjoyment which language learning can provide (Doyle & Meara).

Preparation prior to the actual choice of learning materials may be given through books and broadcasts promoting and supporting self-instruction (e.g. Doyle & Meara). In an institutional setting, training materials could be backed up by workshops, etc., or by interviews with a language-learning advisor (see 2.6.2.c below). Books and broadcasts are easily missed, however, and few learners may have access to institutional support. This implies the inclusion of advice into the materials themselves, whether in an introduction and/or interspersed through the course; another advantage of this approach is the gearing of advice to the specific L2 and the learner's proficiency level.

Giving advice implies acknowledging that problems may occur. Here the "language learning is easy" cluster of mythologies used by publishers to sell their wares (see 2.2.2) can undermine rather than support the learner. When, as is inevitable, the learner's real experience differs with this rosy picture, there is a strong risk of negative motivation, with linguistically naive purchasers tending to blame themselves rather than an unscrupulous manufacturer (Roberts, 1992).

**Actual materials and activity selection**, at the simplest level, may involve a choice of published course packages. Also, language-learning institutions ("language centres": see 6.5.1) usually also provide some sort of materials bank, with either prescribed routes or - more usually - a free choice of activities (Barnett & Jordan, 1991). In addition, learners may find their own authentic materials and design their own learning activities. Finally, many learners may take a mixed route, combining package work, say, with

language-lab video viewing and/or with reading texts that they have obtained themselves.

Good study habits may be encouraged by setting up explicit **learning plans** (cf. metacognitive strategies: 2.4.3.c.i). One means is the "learner contract" (Dickinson, 1987, pp. 98-102): a written statement (e.g. a fill-in form in a coursebook) recording what language work the learner intends to do in a given time. Most reports of contract use, however, relate to teacher-led autonomy mode (e.g. Fernández Toro & Jones, 1996). Their effectiveness in fully solo work (the scope of the present project) is untested - though I suspect that a contract signed by one party might be seen as less than binding by the person concerned.

## 2.6.2 Supporting the learner

### 2.6.2.a Support from learning materials

Besides teaching the language, a learning package may well have concrete support features, and may even offer strategy advice and training.

Dickinson (1987, p. 80ff) sees built-in **reference sections** as an important source of concrete support for the self-studier. Cunningsworth (1984, p. 78) and Dickinson mention the following types of reference support:

- keys to exercises
- L2 vocabulary lists, with meaning supplied by translation (especially at lower proficiency levels) and/or explanation (especially at higher levels)
- lexical, grammatical and functional indexes
- functional, notional and grammatical reference sections (both for the whole book and for each individual unit)
- phonology reference (by phonetic script and/or recordings)

Meara (unpubl.) and Rivers (1983) mention the built-in L1→L2 dictionary as a learner support feature that is often missing. Sadly, Roberts (1992) found 5 out of his 8 "expensive" self-instruction courses of "little or no utility" in reference terms.

Ideally, a self-instruction coursebook would also have an explicit strategy-training element in order to enable the learner to overcome the defects of the self-instruction method itself. The scant empirical literature on teach-yourself packages, however, reports no occurrence of this.

## 2.6.2.b Independent reference materials

Stand-alone dictionaries, grammars, etc. are powerful tools. Authors such as Béjoint & Moulin, however, warn that training is necessary if the learner is to gain full advantage from dictionaries and to avoid the danger of error (1987; cf. 2.5.3.d.iii above). In teach-yourself mode, such training would fall to the responsibility of the coursebook, whereas handbooks (e.g. Whitcut, 1979) or language-centre seminars and worksheets could provide training for the fully-autonomous learner.

Béjoint & Moulin also point out that there is little justification for the much-vaunted superiority of the monolingual over the bilingual dictionary. For decoding (L2→L1), monolingual dictionaries have the advantage of providing rich semantic-field information about the L2 items. Bilingual dictionaries, however, have the advantage of speed and clarity during decoding, and are the only means of encoding (L1→L2) an unknown or forgotten L2 item - fact all too often forgotten in the pedagogic dictionary literature.

## 2.6.2.c Using other people

Dickinson (1987) and Doyle & Meara (1991) argue strongly that, if isolation is the self-instructed learner's key problem, one of her most crucial tasks is to break that isolation by getting in touch with helpers and communication partners. In institutions, formal or informal networks may enable learners to set up such contacts; alternatively, packages could encourage learners to seek such contacts for themselves.

One type of helper is the **informant** (Dickinson) - a native or advanced non-native L2 user who can answer questions about the L2. An informant may also be willing to

converse with the learner in the L2, to check her writing, etc. - perhaps in exchange for similar help with the learner's L1 (a "learning exchange" - Dickinson, p. 104).

L2 advice and learning exchanges, of course, may turn into informal tuition sessions on the "conversation lesson" model - an event which autonomy purists (e.g. Dickinson, ibid.) warn against, though without convincing justification.

In one's home country, expert L2 speakers may be hard to come by outside a higher-education institution. An alternative is to meet up with another learner of the L2 - the "study buddy" option (Dickinson, pp. 102-103; Doyle & Meara, p. 121). Study-buddy pairs and groups can provide conversation practice, can increase support and motivation, and can even give an element of feedback on performance (Dickinson, ibid.) - thus potentially combating the three key defects of self-instruction.

More specific language-learning support and advice (stopping short of teaching or assessment) may be provided by a language-learning advisor (Dickinson, pp. 123-124). This is generally, but not exclusively, an institutional option: at least two publishers, for example, offer an advisory service to their customers. In a field trial, however, Roberts (1995) found their advice either inadequate or impractically long in arriving (three weeks!).

Institutions may also hold databases of L2 learners (potential study buddies) and potential native-speaker informants (cf. Dickinson, 1987, p. 123).

## 2.6.3 Summary and Implications

Training and support for the self-instructed learner may be found in the teach-yourself coursebook, in language-learning institutions and in networks of interpersonal contacts. Though learner-training and support strategies are well described in the methodological literature, explicit advice on coping with the considerable cognitive and affective demands of self-instruction does not seem to be provided in the coursebooks - i.e. where learners are most likely to meet it.

One purpose of the Packages Checklist survey (Chapter 3) is to see whether such advice has filtered down to the coursebook itself. Similarly, one purpose of the main study (Language Experience Survey: Chapter 5) is to examine the self-support strategies developed by learners who lack formal strategic training (except for incidental teacher advice). The Conclusion (Chapter 6) will combine advice from the literature and from the learners to give recommendations as to how language centres and published packages can improve their learner support strategies - especially packages, as they have received much less attention from methodologists and materials-writers in this respect.

Our survey of the self-instruction literature over, we will finally look at what research methods might be best suited for the job in hand.

# 2.7 Data-Gathering Techniques

## 2.7.1 Research types

Data-gathering techniques in SLA research may be classified in various ways (see e.g. Brown, 1988; Seliger & Shohamy, 1989; Scholfield, 1995). **Product-based** methods look at what is produced, whereas **process-based** methods ask how a person (usually the learner) behaves (Faerch & Kasper, 1987a, 1987b). Both methods may be **cross-sectional**, i.e. taking a snapshot at a single moment in time, or **longitudinal**, i.e. following the subject(s) through time. Both may take place under **experimental** or **real-life** conditions. They may test pre-set **hypotheses** or be "heuristic" (exploratory: Seliger & Shohamy) in nature. Finally, methods may take a **quantitative** or a **qualitative** approach to data analysis, depending on whether or not they count and statistically analyse data (Mitchell, 1985). Mitchell sees the most effective research as involving a combination of methods (ibid.;1989), viewing a single phenomenon from different angles in order to provide a more rounded picture.

Product-based methods may use spoken or written, free or elicited data. They are widely used for gauging learner proficiency, but may also be used to examine learning behaviour, e.g. by logging performance on psychometric tests. Product methods are not necessarily more "objective" than process methods: as Roberts (in press) points out, the questions that supply the data may well be based on subjective assumptions. Nevertheless, **reliability** - i.e. the same raw data being coded and analysed in a similar way by different researchers ("inter-rater reliability"), or on different occasions ("intra-rater reliability") - tends to be more of a problem in process-based studies, and will usually need confirming if the findings are to be at all generalisable.

## 2.7.2 Case studies

A final distinction, however, still needs to be made: that between multi-subject studies and case-studies - detailed analyses of one or very few subjects (Abramson, 1992). Though case-studies can provide very rich process-based information, the fact that they look at only a few subjects can make generalising from their findings a problematic business. Abramson, however, argues that case-studies should not be judged in isolation, but relative to other methods of examining the same issue. Thus, in a predictive sense, a case-study can generate hypotheses for a later, more objective study. And in an illustrative sense, a case-study can add vital real-life structure to the bitty, disparate data provided by multi-subject surveys, experiments or literature reviews. Moreover, it may also show "counter-intuitive features" missed by statistical studies, which tend to show the typical rather than the individual.

## 2.7.3 Introspective techniques

Faerch & Kasper (1987a) see introspection as the process method par excellence: the best way, they argue, of finding out what goes on in the learners' minds is to ask them directly, instead of relying on indirect evidence from linguistic product. The records of their introspection are known as **protocols**.

### 2.7.3.a Classifying introspection

One way of classifying introspective techniques is by the time-gap between action and report. Faerch & Kasper (1987a) distinguish between:

★ **simultaneous**, or "think-aloud" techniques, i.e. where subjects record their processes as they are taking place (e.g. Krings, 1986, 1987)

★ **consecutive** techniques; examples, in order of time delay between process and report, are:

    • post-task and post-lesson questionnaires (Slimani, 1989; Jones, 1992)

- learner diaries (Ellis R., 1985, pp 101-102;1989), which seem most valuable when used by sophisticated L2 learners (e.g. Rivers, 1983; cf. O'Malley & Chamot, 1990, p. 100)

- interviews (Naiman *et al*, 1978; Lai, 1991)

Another way to classify introspective techniques is by **elicitation procedure** (Faerch & Kasper, 1987a), with variables such as:

- degree of structure: open-ended (e.g. "say whatever comes into your head") vs. closed-ended (e.g. multiple-choice questions)

- initiator of comments (subject or researcher)

- degree of recall support (e.g. videos of learning event to back up consecutive introspection)

- degree of integration of elicitation with action (i.e. how does the reporting process interact with the reported behaviour?)

## 2.7.3.b Uses and restrictions of introspection

In the context of the present research, introspective techniques seem especially suited for looking at strategies and attitudes (Ellis R., 1985, pp. 101-102) - Naiman *et al* (1978), for instance, found learner interviews to be a much more effective way of finding out learning strategies than observation of behaviour. They also seem suited for accessing declarative language knowledge and metalinguistic/metacognitive awareness (i.e. awareness of language structure and learning: Faerch & Kasper, 1987b, 1987a).

The major restriction, of course, is that introspective techniques can only access conscious, declarable processes. Ellis R. (1985, p. 101) also mentions the risk of self-flattery: of saying what one thinks should be said (especially in consecutive protocols). In any case, some degree of idealisation is likely in consecutive protocols, especially when the introspection is not based on a single, very recent event. Simultaneous means, by contrast, can require extensive informant training (Faerch & Kasper, 1987a).

A problem not unique to introspection is that of identifying intuitively-defined higher-order categories. O'Malley & Chamot (1990, p. 117) report generally "low"

inter-rater reliability in classroom strategy-use studies, and Poulisse *et al* (1990, reviewed by Thomas, 1991) report a token-count overlap of only 42% between two raters in a large-scale communication-strategy study.

## 2.7.4 Self-instruction studies

As already mentioned, empirical studies into fully solo language learning are relatively few. Reeves' 1993 study followed the hypothesis-testing, quantitative product model: he compared pre- and post-course proficiency scores of three groups of learners (classwork, distance and teach-yourself).

Roberts (1992, 1995), by contrast, used a questionnaire survey of volunteer raters trying out particular courses (i.e. structured consecutive introspection); because of the small number of package types examined, analysis had elements of the case-study approach.

Rybak (1983) used pre-course and dropout/post-course questionnaires. As these were sent out "cold" to learners (rather than being filled in during interview), she was able to survey several hundred subjects, but questionnaire return rates were variable (ranging between 42% and 85%), causing potential validity problems. She also used telephone interviews.

In teacher-led autonomy mode, a number of case-studies of individual learners and surveys of learner groups have been carried out (see e.g. Broady & Kenning, 1996a), usually using questionnaires and/or interviews to examine autonomy training in terms of learner processes and attitudes. As already mentioned, introspection (e.g. interviews: Naiman *et al*, 1978) has been found more effective than observation in learner strategy studies.

## 2.7.5 The present project

This project consists of three studies, all heuristic rather than hypothesis-testing. The first pre-study (Chapter 3) constructs a teach-yourself Packages Checklist based on observations and recommendations from the literature and on examination of over 40 course packages; the Checklist is checked for inter-rater reliability. Qualitative observations of interest from the package sample are then presented, and finally the Checklist is used for a detailed case study of two packages.

The second pre-study (Chapter 4) is an introspective case study: a learner diary, written by the researcher to examine a longitudinal process (learning Hungarian over 11 months) in maximally heuristic, open-ended terms. Again, data is analysed qualitatively rather than quantitatively.

The main study (Chapter 5) gives a cross-sectional survey of the language experience of 70 learners. Semi-structured telephone interviews provide language-achievement profiles and open-ended, consecutive-introspection data on processes of self-instruction. Analysis takes a mixed qualitative and quantitative approach, combining multivariate statistical "number-crunching" with learner observations and advice culled from the interview protocols. Reliability is tested by intra-rater means.

The research methods used are discussed in greater detail in the relevant Chapters. Now, in fact, it is time to present these studies in full - starting with the Packages Checklist.

# CHAPTER 3

# TEACH-YOURSELF
# PACKAGES: A CHECKLIST
# TAXONOMY

# 3.1 Aims and Methods

## 3.1.1 Introduction: the two pre-studies

### 3.1.1.a Research questions

The overarching purpose of this doctoral project, as outlined in Chapter 1, is to draw up a map of the foreign-language self-instruction phenomenon: learners' developmental processes, strategies and patterns of materials-use, and how all these interact with learners' characteristics as individuals, their overall language experience, and the features of the materials themselves.

Contained within this was a nexus of key questions, which can be expanded as:

★ What if any, are the differences between published-package and autonomous-materials use?

★ Are most published packages indeed beyond the pale in methodological terms?
  • Even if this is an over-statement, how can quality be improved?
  • Are there intrinsic limits to their improvability?

★ Does autonomous work indeed improve learners' performance and/or motivation?
  • If so, how?
  • If not, why not?

★ What role do learners' individual characteristics and wider language experience play?

★ How can learners be supported into making more effective use of self-instruction methods?

### 3.1.1.b Scouting out the terrain

The main method I use, both to pursue the project's overall purpose and to search for answers to these specific questions, is to ask learners to describe their achievements and experiences: the Language Experience Survey (Chapter 5). But here my questions, however open-ended they may be, need to be guided by assumptions as to what information is likely to be relevant, and what is not: in other words, scouting needs to come before mapping proper.

As the previous Chapter has shown, there is plenty of published information about classroom language acquisition processes, individual learner characteristics, and general materials-design practice. The autonomous materials-use and learner-support fields, too, have been well scouted by Dickinson (1987). But two key areas were virtually unknown when this project had its genesis[6]: what features the published teach-yourself package actually has; and what processes and factors might affect the longitudinal language development of the self-instructed learner. Hence, before embarking on the main Language Experience Survey, I decided to undertake two pre-studies exploring these areas: the Packages Checklist (this Chapter), and the Learner Diary Study (Chapter 4).

In one sense, therefore, the two pre-studies are awareness-raising tools. Together with the surveys of other sub-areas from Chapter 2, they should form a provisional sketch-map of the self-instruction experience. This will act as a topographical framework, onto which the finer details provided by the main study (Chapter 5) can then be drawn.

### 3.1.1.c The expert view

In another sense, however, the Checklist and the Diary should also provide data that is useful in itself. Ethnomethodology alone - modelling language behaviour solely

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[6] Roberts' work on expensive cassette-based packages (1992, 1995) appeared after the Checklist was drawn up.

according to the intuitions of its users (Levinson, 1983) - is a one-sided data source, as Mitchell (1985, 1989) points out. It is vital, I feel, to combine the views of "naive users", i.e. the learners, with those of "experts", who have a wider vantage-point than that of their own personal experience. Again, writers such as Dickinson (1987) and Doyle & Meara (1991) provide us with an expert viewpoint on some fields. But in the *provinciae incognitae* of self-instruction packages (*pace* Roberts 1992, 1995) and developmental processes, the researcher himself - an experienced language teacher and language learner - will have to provide the expert overview.

With the Packages Checklist, there are two sources of expert input. Firstly, there is the Checklist's form and scope, which reflects a certain design philosophy (see Section 3.1.2 below). Secondly, the Checklist is used in two qualitative case studies to generate data relevant to the research project as a whole: summaries are given of key features from the packages used to help build the Checklist (Section 3.3.1), and then two Hungarian packages are compared in greater detail (Section 3.3.2). Both case studies, combined with the learner interview data, should give a good indication of the methodological quality of published packages (a sub-aim of this project). The second also lays the foundation for the Learner Diary Study (Chapter 4), as the two packages analysed are those used by the diarist/researcher.

The methodology of the Learner Diary will be discussed in more detail in Chapter 4. The expert input here, however, comes from the fact that the learner/diarist is also the researcher.

## 3.1.2 The Checklist: design purpose and philosophy

### 3.1.2.a Descriptions

Published teach-yourself packages, it is claimed in Chapter 1, suffer from an image problem. The overwhelming vision among many language-learning professionals seems to be of a dry, restricted and over-prescriptive model of language learning, with little input from modern interactionist, learner-centred models.

Such packages certainly exist (Roberts, 1992, 1995), though it is uncertain whether all or even most packages used fit that description. It is worth mentioning, however, that self-instruction sets the learner radically different demands than classroom instruction: thus "old-fashioned", for example, might also mean "tried and tested", and "prescriptive" might also mean "providing clear guidance". In any case, the present taxonomy attempts to be value-neutral and descriptive, recording what features were present (as gleaned from a sample of 46 packages) or might be present (as gleaned from the self-instruction and general materials-design literature: Chapter 2).

### 3.1.2.b Assumptions

As Roberts (in press) points out, however, it is impossible to avoid subjectivity in checklists: both what one includes and what one omits betray one's philosophy. Thus, though this Checklist tries to be descriptive and non-judgmental, it does have certain underlying qualitative assumptions:

★   that learning requires coherent and manageable input, plus an adequate and varied range of both form- and message-focused practice activities (Literature Review 2.3.2, 2.3.3);

★   that a variety of texts and practice activity types stands the most chance of coping with differences in learners' cognitive and affective selves (Literature Review 2.4);

★   that a self-instruction package should reproduce not only the teacher's language-training role, but also her learner-support and strategy-training roles (Literature Review 2.6);

★   that a coursebook should be not only a training manual, but also a reference handbook (Literature Review 2.6.2.a);

★   that the nature of the L2 influences teaching and learning strategies (Literature Review 2.3.4).

### 3.1.2.c Uses

Besides being a generator of research questions and data, it was felt that the Checklist might help the learner or the language centre to select materials. As it aims for comprehensiveness, it is too long and unwieldy for everyday purposes (cf. Roberts, in press). The sketch-map it furnishes, however, can be combined with the learners' comments from the main study to generate a user-friendlier guide for future users (materials writers, language centre purchasers and advisors), which also states what features should and should not be there (see 6.3).

## 3.1.3 Sources, sampling, reliability

### 3.1.3.a Sources and sampling criteria

Input for the Checklist came from the self-instruction and general materials-design literature on the one hand (Chapter 2), and a range of actual packages on the other. The latter were selected according to the following initial criteria:

★ L1 is assumed to be English, and L2 another language (a restriction underlying the whole project);

★ *ab initio* courses only (though the checklist should be usable for non-beginner courses);

★ available at Newcastle University Language Centre Study Lab (all the main study's interviewees were registered N.U. Study Lab Users, though not all their experience was with N.U. Study Lab materials).

The 46 packages used are listed in Table 3.1.3/i below. Languages are classified according to genetic closeness with English - a variable ("*Exoticism*") examined in the main study (Learner Experience Survey - Chapter 5).

## Table 3.1.3/i

## Packages used as input to Checklist Taxonomy

| Romance/Germanic languages | |
|---|---|
| Danish | *Teach Yourself Danish* (Koefoed, 1958) |
| Dutch | *Reading Dutch* (Shetter & Bird, 1985)<br>*Speak Dutch* (Lagerwey, 1970) |
| German | *Auf Deutsch Gesagt* (Schneider, year unknown)<br>*Deutsch Direkt!* (Trim *et al*, 1985)<br>*Get By in German* (Baer *et al*, 1981)<br>*Grundkurs Deutsch* (Schäpers *et al*, 1980) |
| Italian | *Hugo's Italian in Three Months* (Dawson-Bellone, 1976)<br>*Teach Yourself Essential Italian Grammar* (Ragusa, 1963) |
| Spanish | *¡Digame!* (Escribano & Winterflood, 1978)<br>*España Viva* (Utley, 1987)<br>*Zarabanda* (Ariza *et al*, 1971) |
| **Other Indo-European languages** | |
| Farsi | *Persian Grammar / Persian Vocabulary* (Lambton, 1953 / 1954)<br>*Teach Yourself Modern Persian* (Mace, 1971) |
| Gaelic | *Can Seo* (Macleod, 1979) |
| Greek | *Greek Language and People* (Hardy, 1984)<br>*Instant Greek* (Papas, 1985) |
| Polish | *Mówimy po polsku* (Bisko *et al*, 1973) |
| Russian | *Assimil Russian Course* (Chérel, 1951) |
| Serbo-Croat | *Colloquial Serbo-Croat* (Hawkesworth, 1986)<br>*Teach Yourself Serbo-Croat* (Javarek & Sudjić, 1963) |
| Welsh | *Catchphrase* (Davies & Davies, 1980)<br>*Linguaphone Welsh Course* (Davies & Davies, 1977)<br>*Welsh is Fun!* (Gruffudd & Elwyn, 1978) |
| **Non Indo-European languages** | |
| Arabic | *Get By in Arabic* (El-Ghobashy & Wise, 1985)<br>*Introduction to Arabic* (Mitchell & Barber, 1972) |
| Bahasa Indonesia | *Indonesian* (World Publishing, 1965) |
| Cantonese | *Everybody's Cantonese* (Chan, 1955)<br>*Everyday Cantonese* (Chik, 1985) |
| Chinese (Putonghua) | *Chinese 300* (Zhang & Mao, 1986)<br>*Chinese in Ten Minutes a Day* (Kershul, 1982)<br>*Colloquial Chinese* (T'ung & Pollard, 1982)<br>*Everyday Mandarin* (Woods & Flower, 1984)<br>*Fun With Chinese Characters* (Tan, 1980)<br>*Get By in Chinese* (Flower, 1988)<br>*Learn to Speak Chinese: A Course in Phonetics* (Radio Peking<br>    English Section, 1977)<br>*Linguaphone Chinese Course* (Pollard & Chang, 1976)<br>*Practical Chinese Reader* (Beijing Languages Institute, 1985) |
| Hungarian | *Learn Hungarian* (Bánhidi *et al*, 1965)<br>*Hungarian in Words and Pictures* (Erdős *et al*, 1990) |

**Table 3.1.3/i (continued)**

| Japanese | *Beginning Japanese / Reading Japanese* (Jordan & Chaplin, 1963/1976) <br> *Get By in Japanese* (Moran, 1987) <br> *Japanese for Busy People* (Association for Japanese Language Teaching, 1984) <br> *Japanese for Today* (Yoshida *et al*, 1973) |
|---|---|
| Swahili | *Swahili Grammar* (Ashton, 1947) |
| Turkish | *Teach Yourself Turkish* (Lewis, 1953) |

Random sampling was not attempted. The wide differences between L2s in terms of number, variety, modernity and quality of packages available would have made it highly problematic. In any case, comprehensiveness of coverage was felt to be more important than typicality at this stage (the latter is the concern of the Language Experience Survey: Chapter 5). Packages, therefore, were chosen to give as wide as possible a spread of L2s and "house styles" (Roberts, 1995).

It will be seen from publication dates in the table that many courses were far from modern when the Checklist was compiled (1992). This did not necessarily mean that the package as physical object was old: in the sample, there could be up to 30 years between the first and the latest printing![7] Some courses, however, were genuinely old: 6/46 were printed before 1975. They were still available for Study Lab Users, however - and with the least popular languages, pre-1975 impressions were the only courses stocked. Moreover, older packages were also mentioned by the main-study learners (Chapter 5), especially as they were not only talking about present learning experiences (Subject S68, for example, mentioned Linguaphone gramophone records!). In any case, such an age profile was felt to give a more valid picture of what packages the typical British learner in the early 1990s might actually use - new, second-hand, borrowed - than just those in the bookshops at the moment of the Checklist's compilation.

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[7] The years listed in the Table are those for the edition examined; giving the date of the first edition would have pushed the first-appearance date of many "new" courses back even further.

Most (39/46) are all-round packages. The inclusion of some skill/language-area specific "backup" materials (7/46) was justified in retrospect by their reported use by main-study interviewees (see e.g. *Grammarbook*, *VocabBook*: Table 5.4.4/x).

The exclusion of French packages (a tactic designed to circumvent the dominance of French as the paradigmatic L2) was perhaps ill-judged: French *is*, inescapably, the dominant foreign language for British learners, as the main study showed (Table 5.4.3/xii). Subsequent checking with the Study Lab's most commonly-used *ab initio* French courses (*A Vous la France* - Page, 1994 - etc.), however, showed no need to alter the Checklist. There is an opposite imbalance in the case of Chinese (Putonghua): here, *all* the materials available in the Study Lab were examined in order to explore the full range of main-course and backup materials available to the learner of a language.

### 3.1.3.b Reliability

For the checklist to have any hope of objectivity, it was considered important to test for reliability. The first version of the checklist, which used 5-point Likert scales - e.g.

Reading = high< 1 2 3 4 5 >zero priority?

- was given to 10 raters (all language teachers), along with a terminology guide and a self-instruction package each. The assessments were repeated by the researcher. Inter-rater reliability turned out to be non-existent, with highly-significant differences between the researcher's and the other raters' mean scores for each item (paired $t$ 2.91 @ 91 d.f., p .01). Such a result seriously calls into question the widespread use of Likert scales and rater-supplied descriptions in materials assessment[8].

A change to two- and three-way tick-box judgements and page-counts, however, considerably improved reliability. As item scores were no longer quasi-numeric, the technique for calculating reliability also had to change. This time the two-rater chance

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[8] This does not invalidate the use of Likert scales for gathering data from larger numbers of subjects, where individual-subject unreliability will be evened out.

agreement value was calculated per item (e.g. Item 1a.2: choice of 2 tick-boxes, chance agreement = 1/2; Item 1a.3: 3 tick-boxes, chance agreement = 1/3); the individual items' values were then merged to give a chance agreement value per section. This was then compared against the actual two-rater agreement value per section. A paired $t$-test was run on each of seven packages, giving inter-rater agreements significantly higher than chance in six of the seven packages (p-values .02, .03, .03, .04, .05, .05, .07). This was judged acceptable. A single combined t-test was not attempted, as it was suspected that the data would violate normal-distribution requirements.

A final version of the Checklist follows, as given in Jones (1993) - a published report of the Checklist study. Photocopies of a "raw" version, filled in for Bánhidi et al (1965), can be found in Appendix A3.i[9].

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[9] The published version incorporates certain minor textual changes suggested by the editor of System, Norman Davies, mainly in order to avoid the need for a separate terminology guide.

# 3.2 The Checklist

Title/target language: _____

Authors: _____

First published: 19__  Most recently reprinted: 19__

## 1 Language-contrastive factors

IN SECTION 1, TICK ONE BOX PER QUESTION

**Item 1a. Phonology**

<u>.1 Phones:</u>

☐ Fewer than 10 L2 phonemes have no rough equivalents in English (unfamiliar sounds, e.g. /x/, or divisions of sound, e.g. /e/ and /ɛ/)

☐ 10 or more L2 phonemes have no rough equivalents in English

<u>.2 Rhythm</u>

☐ L2 words have stressed and unstressed syllables

☐ L2 words have a weak or non-existent stress pattern

<u>.3 Tone</u>

☐ The L2 only uses sentence-level intonation

☐ L2 words have fixed intonation-contours

☐ The L2 is a tonal language (different tones give different phonemes)

**Item 1b. Script**

☐ The L2 uses a phonetically consistent Western script (i.e. most sound-letter links = 1:1 - e.g. German)

☐ The L2 uses Cyrillic or Greek script

☐ The L2 uses a phonetically inconsistent Western script (e.g. French)

☐ The L2 uses a phonetically consistent non-European script (e.g. Arabic)

❑ The L2 uses a phonetically inconsistent non-European script

❑ The L2 uses an ideographic script (e.g. Chinese)

❑ The L2 script combines ideographic & phonetic elements

**Item 1c. Lexis**

❑ Half or more content words in most sentences are similar to English words

❑ Most sentences have at least one content word similar to English

❑ Few if any L2 words are similar to English

**Item 1d. Grammar**

<u>.1 L2 grammar is:</u>

❑ mainly analytic (grammar expressed by separate words in order: e.g. English, Chinese)

❑ combined synthetic (grammar expressed by changes with no 1:1 form:meaning link) and analytic (e.g. German)

❑ mainly agglutinative (grammar expressed by chains of particles with a 1:1 form:meaning link: e.g. Turkish)

❑ strongly synthetic

<u>.2 L2 surface word-order is:</u>

❑ generally SVO

❑ SVO with variants (e.g. German)

❑ non-SVO

## 2 Learning objectives

**Item 2a. Learner target group**

<u>.1 LSP</u>

TICK ONE BOX ONLY

❏ Course seems designed for general learners

❏ Course seems designed for holidaymakers

❏ Course seems designed for other specific learners

_____ ← IF "OTHER SPECIFIC", WRITE LEARNER-TYPE HERE

<u>.2 Group setting</u>

TICK ONE BOX ONLY

❏ Course originally designed for self-study

❏ Course originally designed as back-up/self-access resource

❏ Course originally designed for classwork

❏ Multi-purpose/aim unclear

**Item 2b. Actual objectives**

From the evidence of the texts and student tasks, which of the categories listed below seem to be Important (I), which seem Less Important (LI) and which do Not Occur (NO) at all? TICK ONE BOX IN EACH ROW

<u>.1 Language elements</u>

**I    LI    NO**

❏ ❏ ❏ Phonology

❏ ❏ ❏ Script

❏ ❏ ❏ Lexis

❏ ❏ ❏ Grammar

❏ ❏ ❏ Pragmatic function

❏ ❏ ❏ Discourse structure

❏ ❏ ❏ Culture

## .2 Varieties

I  LI  NO

❏ ❏ ❏ Different dialects/regional varieties

❏ ❏ ❏ Different styles

❏ ❏ ❏ Different registers

## .3 Skills

I  LI  NO

❏ ❏ ❏ Reading

❏ ❏ ❏ Writing

❏ ❏ ❏ Listening

❏ ❏ ❏ Speaking

❏ ❏ ❏ Paralinguistics

❏ ❏ ❏ Translation

## .4 Process aims

I  LI  NO

❏ ❏ ❏ Study-skill training (if there's a "how to use this book" section but no strategy

training in the course itself, tick LI)

❏ ❏ ❏ General cognitive development

❏ ❏ ❏ Acculturation

❏ ❏ ❏ General affective development

## .5 Performance

I  LI  NO

❏ ❏ ❏ Fluency

❏ ❏ ❏ Accuracy

## .6 Exit proficiency

Look at the final unit. What proficiency level[10] will the learner probably have reached on successfully completing the course?

TICK THE NEAREST APPROPRIATE BOX (ONE ONLY):

❑ Command of basic words and phrases                                    2

❑ Conveys/understands general meaning in a few restricted situations    3

❑ Can handle basic situations, though with problems                     4

❑ Rough-and-ready command of good range of situations, many mistakes    5

❑ Effective general command, some complex language, some mistakes       6

❑ Good general command, complex language, occasional mistakes           7

❑ Very good command, few mistakes/misunderstandings                     8

❑ Equivalent to educated native speaker in all but accent              9

**Item 2c. Stated aims**

Look for an introduction describing aims, "how to use this course", etc.

__ ← IF THERE IS ONE, WRITE HOW MANY PAGES LONG IT IS HERE

Note below any points in the introduction (or in the accompanying literature) which actively contradict findings from 2b:

•

•

•

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[10] Band descriptors and numbers based on the International English Language Testing System, developed by the British Council.

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# 3 Syllabus

### Item 3a. Organising criteria

<u>.1 Main syllabus-type</u>

Look through the whole book. What language area, systematically ordered, appears to provide the *main* underlying skeleton (cf. 3a.2)?

TICK ONE BOX ONLY

❑ Phonology

❑ Script

❑ Grammatical structure

❑ Situations/settings (e.g. "at the post office")

❑ Language functions (e.g. apologising, requesting)

❑ Notions/lexical fields (e.g. past time, transport)

❑ Skills/tasks (e.g. reading & writing techniques, or sequences of texts + exploration activities)

❑ Multi-dimensional (2 or more equally-important syllabus strands)

<u>.2 Syllabus strands</u>

Which of the following areas are organised into coherent syllabuses running through all or part of the course (including the main syllabus-type)?

TICK ONE OR MORE BOXES

❑ Phonology

❑ Script

❑ Grammatical structure

❑ Situations/settings

❑ Notions/lexical fields

❑ Language functions/style

❑ Skills/tasks

❑ Culture

**Item 3b Sequencing**

<u>.1 Sequencing criteria</u>

What factors determine the order in which the *main-syllabus* items are supplied?

TICK ONE OR MORE BOXES

❑ Difficulty/complexity

❑ Utility/frequency

❑ Storyline

❑ Order seemingly random

<u>.2 Are syllabus topics recycled?</u>

TICK THE APPROPRIATE BOX(ES)

❑ Yes - in special revision units

❑ Yes - in later units

❑ No - the syllabus is completely linear


# 4 Role of materials

**Item 4a Make-up of the course**

<u>.1 Proficiency levels</u>

TICK ONE BOX ONLY

❑ One course package only

❑ Two or more discrete level packages

<u>.2 Component types</u>

TICK ONE OR MORE BOXES

❑ Coursebook

❑ Reference book

❑ Workbook

❑ Live broadcasts

❑ Audio recordings

❑ Video recordings

❑ CALL software

❑ On-line CALL

**Item 4b Typical Unit size and gradient**

FOR THE REST OF SECTION 4, DESCRIBE THE "MIDDLE" UNIT OF THE COURSE (if the package has an even number of Units, or the Unit is a revision Unit, take the Unit just below the middle, e.g. Unit 15 out of a total of 30 Units):

Middle unit number: __ Total number of units in the (level) package: __

.1 Page ratios

ENTER NUMBER OF A5 PAGES (OR EQUIVALENT) ON THE LEFT

__ Length of whole unit

__ Number of pages of L2 dialogue or prose

__ Number of pages of illustrations

__ Number of pages of vocabulary lists

__ Number of pages of language explanation

__ Number of pages of learner activities

.2 Target lexicon

__ Number of target vocabulary items in this Unit

__ Total estimated lexicon for the (level) package (= previous figure x total number of Units)

**Item 4c Text features:**

STILL LOOKING AT THE MIDDLE UNIT...

.1 Authenticity of dialogue or prose text

TICK ONE OR MORE BOXES AS APPROPRIATE:

❑ At least some fully-authentic text (including listening)

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❑ At least some scripted but natural text

❑ At least some old-fashioned or highly unnatural text

❑ (No supra-sentential text in this unit)

### .2 Illustrations

## TICK ONE OR MORE BOXES AS APPROPRIATE:

❑ At least some illustrations contextualize/explain

❑ At least some illustrations merely decorate

❑ (No illustrations in this unit)

**Item 4d Language explanation**

## STILL LOOKING AT THE MIDDLE UNIT...

### .1 Code

## TICK ONE OR MORE BOXES AS APPROPRIATE:

❑ At least some metalanguage is in the L2

❑ At least some metalanguage is in English

❑ At least some metalanguage is iconic (using symbols)

❑ (No language explanation in this unit)

### .2 Accessibility

## TICK ONE BOX ONLY

❑ Metalanguage uses specialist linguistic terms (if iconic, requires reference to a key)

❑ Metalanguage readily comprehensible by non-linguists

❑ (No language explanation in this unit)

### .3 Means

## TICK ONE BOX ONLY

❑ At least some inductive (discovery) work

❑ All language points presented deductively (explanation then practice)

❑ (No language explanation in this unit)

**Item 4e Task features**

STILL LOOKING AT THE "MIDDLE" UNIT ONLY, ENTER THE NUMBER OF PRESENTATION AND/OR PRACTICE TASKS A FEATURE OCCURS IN (NOT OCCURRING = 0).

.1 Total number of learner tasks: __

.2 Medium focus

| | |
|---|---|
| Repetition | occurs in __ tasks |
| Memorisation | occurs in __ tasks |
| Translation | occurs in __ tasks |
| Other manipulation of L2 form | occurs in __ tasks |

.3 Message focus

| | |
|---|---|
| Reading/listening practice | occurs in __ tasks |
| Elicited speech or writing | occurs in __ tasks |
| Language use paralleling real-life language use | occurs in __ tasks |
| Problem-solving | occurs in __ tasks |
| Game structure | occurs in __ tasks |
| Role-play/simulation | occurs in __ tasks |
| Integrated-skill activity | occurs in __ tasks |
| Learner personalization | occurs in __ tasks |
| Interpersonal communication | occurs in __ tasks |
| Work outside course framework | occurs in __ tasks |

.4 Learning to learn

| | |
|---|---|
| Study-skill training | occurs in __ tasks |

# 5 Relationship with the learner

NOW LOOKING AT THE WHOLE COURSE...

**Item 5a Learner autonomy**

TICK ONE BOX ONLY

❑ Learner assumed to follow prescribed page-by-page route

❑ Learner follows general route with optional elements

❑ Learner free to select and sequence learning according to own needs

**Item 5b Learner support**

<u>.1 Intrinsic support features</u>

TICK THE FEATURES CONTAINED IN THE COURSE MATERIALS

❑ Contents pages listing language points covered

❑ Alphabetical page-index of language points/vocabulary

❑ English⇨L2 dictionary

❑ L2⇨English dictionary

❑ Separate grammar reference section

❑ Separate phonology reference section

❑ Notionally-grouped glossary of words and phrases (1 or 2 areas only)

❑ Notionally-grouped glossary of words and phrases (>2 areas)

❑ Full L1 translations of most or all presentation texts

❑ Exercise keys

❑ Tests

<u>.2 Strategy-development features</u>

TICK THE FEATURES CONTAINED IN THE COURSE MATERIALS

❑ Needs analysis questionnaire

❑ Learner contract

❑ Encouragement/feedback on progress

<u>.3 Advice and backup</u>

Are the following features Offered (O), Recommended (R), or Not Mentioned (NM)?

TICK ONE BOX IN EACH COLUMN

**O   R   NM**

❑ ❑ ❑ Teacher/class

❑ ❑ ❑ Native-speaker informant

❑ ❑ ❑ Interaction with native speakers

❑ ❑ ❑ Language-learning advisor

❑ ❑ ❑ Study buddy/learner group

❑ ❑ ❑ Other advice, i.e. _____

## 6 General/subjective comments

- 
- 
-

# 3.3. Applications

Two applications of the checklist are given here. The first is a qualitative summary of key features that emerged from the 46-package sample used to help form the questionnaire. The second foreshadows Chapter 4 by comparing in detail the two packages that are used in the longitudinal Diary Study.

## 3.3.1 Overall sample survey

### 3.3.1.a Findings

I do not intend to give a large-scale, quantitative listing of findings here, both in view of the sampling problem mentioned and for reasons of space. Some details, however, are worth mentioning.

As might be expected, main syllabus-type and methodology tends to follow the prevailing fashion at the time of first publication. Thus some more recent publications, especially the BBC courses (e.g. *España Viva*: Utley, 1987; *Greek Language and People*: Hardy, 1984), show multi-stranded syllabuses (grammar, lexis, script, etc.) and a wider variety of tasks (including e.g. role-play, coping with authentic text, etc.).

The picture is far from consistent, however. On the one hand, there is a depressing survival of audio-lingual-type courses (grammatical main-syllabus, lexis low priority, highly-restricted, medium-focused task range) well into the 1980s: several recent packages, for example, contain no message-focused practice whatsoever (e.g. *Colloquial Chinese*: Tung & Pollard, 1982).

On the other hand, several of the older "grammar-translation" courses are actually multi-stranded in syllabus terms, with grammar and lexis given roughly equal priority. A good example is *Teach Yourself Danish* (Koefoed, 1958), where the large number of English-Danish cognates enables a high-input, whole-semantic-field approach to lexis

(recalling Meara's 1993 remark that degree of L1-L2 cognacy should be a key determiner of vocabulary teaching strategies: Literature Review 2.3.4). In addition, though most exercises of such courses are controlled, translation usually takes second place to L2 structure manipulation.

Only one package has paralinguistic objectives (Checklist Item 2b.1): the back-up course *Instant Greek* (Papas, 1985):

### Figure 3.3.1/i

### Paralanguage as course objective (Papas, 1985)



**-It's finished-**
Lean back with the chin raised and slap your hands several times.

**-C'est fini-**
Penchez-vous en arrière, menton haut, glissez vos mains l'une contre l'autre en les claquant plusieurs 'fois.

**-Es ist zu Ende-**
Lehnen Sie sich zurueck, heben Sie Ihr Kinn und schlagen Sie beide Handflaechen mehrmals nach oben und unten gegeneinander.

**-Det är slut-**
Luta er bakåt, skjut hakan i vädret och slå hand-flatorna mot varandra upprepade gånger.

Τελείωσε.
Teleéosay.

Cultural content as explicit or implicit course objective ("Landeskunde") is more common, though in *Welsh is Fun* (Gruffudd & Elwyn, 1978) this is also somewhat tongue-in-cheek:

Figure 3.3.1/ii

Teaching the target culture (Gruffud & Elwyn, 1978)
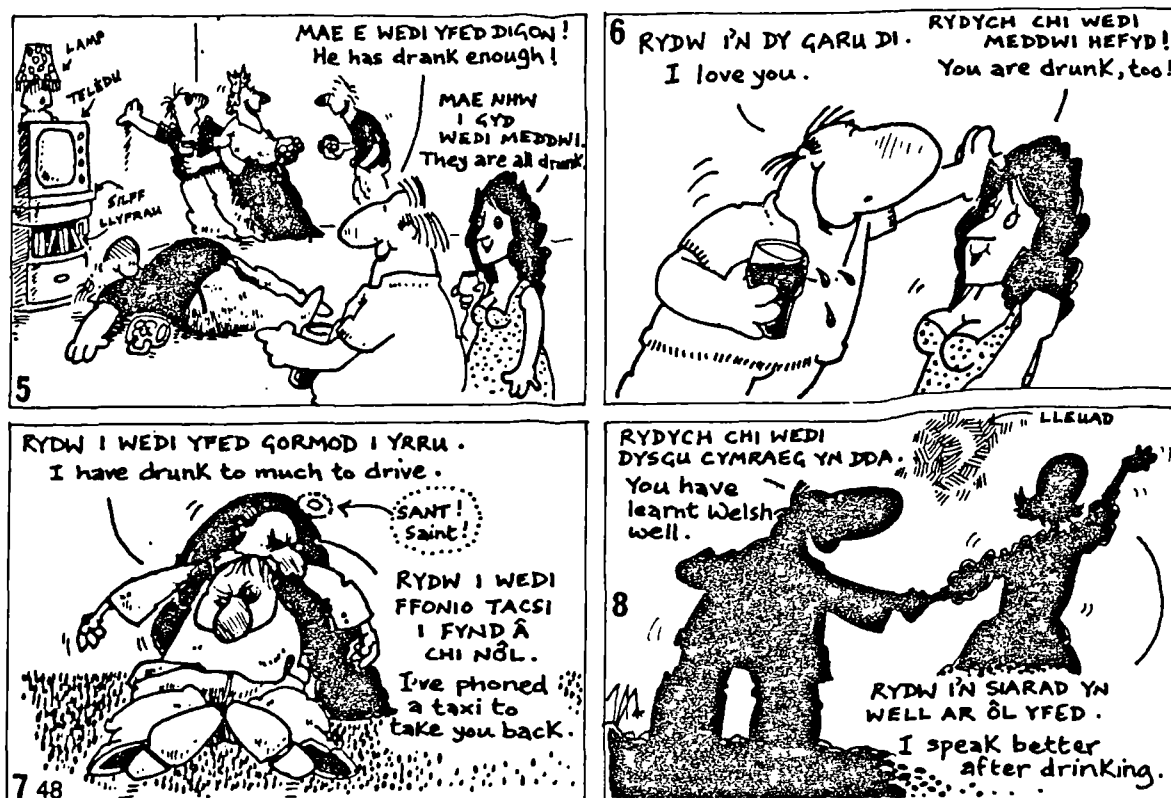


Despite their apparently high acquisition value, personalised tasks are extremely rare - indeed, they are as likely as not to be found in the older packages (e.g. "Write about your family": *Learn Hungarian*, Bánhidi *et al*, 1965).

Learner autonomy and strategy development is rarely addressed. All packages assume that the learner follows a page-by-page route. Only one (*Chinese in 10 Minutes a Day*: Kershul, 1982) gave encouragement to the learner, and only one provided concrete feedback ("You scored under 59: ... you ought to go through the previous lessons once again" - *Hungarian in Words and Pictures*: Erdős *et al*, 1990). None gave a needs analysis questionnaire or a learner contract. Only 2 packages advised taking classes and getting in touch with native-speakers - both of them Welsh-teaching packages, where it

is assumed that the learner lives in the L2 society (Gruffudd & Elwyn, 1978; Davies & Davies, 1980).

Most interesting of all, however, there is no evidence of an increase in learner support features (Item 5b) with recency of first publication. Indeed, the survival of audio-lingual methods and the advent of the communicative approach in the 1980s seem to have conspired to make explicit knowledge and reference work disreputable. Only 18/46 packages, for example, are identified by at least one rater as having an English⇨L2 dictionary - thus inexplicably refusing the learner a valuable prop, as Rivers (1983) and Meara (unpubl.) point out. Conversely, one highly traditional package (Bánhidi *et al* again) has all but one of the intrinsic support features from Item 5b.1, lacking only full L1 translations of the presentation texts - perhaps the least justified feature in learning terms.

### 3.3.1.b Implications

Though depressingly old-fashioned and restricted methodology is to be found, this is not true of all teach-yourself packages: some, especially the BBC courses, make a real effort at combining intrinsic interest with (post-) communicative methodology. This broadly confirms the findings of Roberts and Rybak (1992, 1995; 1983: Literature Review 2.2.2); the fact that Roberts is much less sanguine about most of his packages seems to be mainly due to the fact that he focused on a small, atypical range of (expensive) packages[11].

Moreover, it appears that old-fashioned does not necessarily mean dire, or modern mean progressive. In fact, just as it appears a mistake to tar all self-instruction packages with the same brush, it appears unwise to see packages as unanalysed wholes, as they may be grim in some respects and supportive in others (e.g. Bánhidi *et al*,

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[11] Such a scandalously inverse relationship between quality and price must be due to the fact that the "expensive" packages he focused on were sold by mail order rather than through bookshops (thus offering learners over-priced pigs in pokes). One suspects that such sharp practice is a major cause of the bad name given to teach-yourself packages as a whole.

1965). This seems to justify the atomistic, feature-based approach which this checklist exemplifies.

In terms of prescriptive implications, the "more features the better" assumption is not yet invalidated. Conversely, lack of variety appears to be at the root of many courses which give an overall unsatisfactory impression, such as the largely audiolingual *Colloquial* series.

"Grammar-translation" would appear to be a misnomer when describing the traditional package typified by the *Teach Yourself* series (at least before its 1990s overhaul: contrast Pontifex, 1993). "Grammar-lexis", it seems, would be a better name for the highly-cognitive, grammar and lexical input-based approach that these packages adopt.

Most of these implications, however, are no more than provisional. A full evaluation of packages and package also requires judgements from real learners - information which the other two studies in this project should supply.

## 3.3.2 Two Hungarian packages: a detailed comparison

### 3.3.2.a Findings

This section uses the Checklist directly, comparing *Learn Hungarian* (Bánhidi *et al*, 1965) and *Hungarian in Words and* Pictures (Erdős *et al*, 1990) - the two packages used in the Learner Diary (Chapter 4).

To start with, though both packages had audio recordings (Item 4a.2), these were only available for Bánhidi *et al*.

Section 1 pinpoints lexis as a major conscious-learning priority ("few if any words are similar") for Hungarian. It identifies grammar as agglutinative - thus high-profile but with clear form-function links.

The packages agree with this perception: both lexis and grammar rate as "important" in Item 2b.1. There is an interesting difference in syllabus terms, however. Bánhidi's units

are sequenced by both grammar and lexical fields ("multi-dimensional": Item 3a). Erdős's syllabusing is largely grammatical ("structural"), however, despite a situation/ setting-based sub-strand (e.g. "Tamás's journey by train"); its lexical coverage was less thorough and coherent as a result. On the other hand, Bánhidi's social-realist texts ("the peasants here are cheerful, rich and happy": p. 58) are highly old-fashioned and stilted (Item 4c.1), making the lexis less reliable for learning purposes.

Erdős cuts down on L1 metalanguage by using iconic symbols (the most complex system amongst all 46 packages), which require constant reference to a key: see Figure 3.3.1/iii below for just part of the latter:

## Figure 3.3.1/iii

## Iconic symbols (Erdős et al, 1990: pp. 18-19)

3. *Persons:*

| | | | | |
|---|---|---|---|---|
| én | *(I)* | mi | *(we)* |
| te | *(you)* | ti | *(you)* |
| ő | *(he, she)* | ők | *(they)* |
| ön | *(you; formal)* | önök | *(you; formal)* |

4. *Possessive constructions:*

| singular possession | | plural possession | |
|---|---|---|---|
| possessor | possession | possessor | possessions |
| | | | |
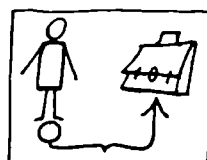
a férfi táskája

*(the man's bag)*
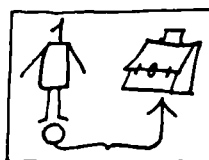
táska

az én táskám

*(my bag)*

Bánhidi *et al*'s very thorough English grammar explanations would not be readily comprehensible by a non-linguist (an area where learners value both explicit and non-technical explanations: cf. Section 5.4.4.d.iv: *METALANGUAGE*). On the other hand, all the linguistic information in this book can readily be accessed by means of English⇨Hungarian and Hungarian⇨English dictionaries, grammar indexes, highly-detailed contents pages, etc. (Item 5b.1) - all of which Erdős lacks, making it virtually unusable as a reference tool.

Where Bánhidi concentrates on written mode, Erdős gives equal prominence to all four skills (Item 2b.3). Unfortunately, both books stress accuracy at the expense of fluency (Item 2b.5), with most tasks (Bánhidi 16/16, Erdős 32/36) having at least some medium focus and only a quarter having at least some message focus (Bánhidi 4/16, Erdős 9/36).

Erdős has more revision units (Item 3b.2), with tests and feedback based on test score (Item 5b.1, 5b2): a feature which turned out, during the Learner Diary experience, to be highly motivating. The sheer length of Erdős' typical units (28 pages as opposed to Bánhidi's 17), however, gives less sense of progress.

### 3.3.2.b Implications

It appears from the checklist that both books have advantages and drawbacks in learning terms; thus I was to alternate between them during the textbook-based phase of my learning (Chapter 4). My change-over to full autonomy at intermediate proficiency (Level 5: Item 2b.6) is not necessarily an indictment of the packages, however, as this was roughly the target proficiency of both courses.

Doubts remain, however, as to whether a learner with less language-learning know-how than myself would be able to cope with the packages' drawbacks, compounded by both books' dense, dry feel (Checklist Section 6). Or to develop the autonomous strategies essential to survive both during and after these courses: no strategy training, explicit or implicit, is given.

A comment by Bánhidi's other rater[12] indicates that the value of a package may also depend on the learning setting: "it was particularly useful when I had regular contact with the L2 environment" (i.e. when he lived in Hungary). This may partly be because of its excellent reference accessibility; though the rater also concurs with several learners in the main study (Section 5.4.4.j.i *CLASSWORK*), who saw self-instruction as easier in the L2 country.

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[12] Who supplied the example Checklist in Appendix A3.i.

# 3.4 Evaluation

An informal survey of teach-yourself packages has revealed as much complexity and variation in terms of internal features and overall quality as a similar set of classroom courses for a similar range of languages. There seems no justification, therefore, for relegating teach-yourself materials to the comic or lunatic fringe: in other words, they are as deserving an object of study as class materials.

Packages often lacked key elements, it is true; and joyless or plain bad coursebooks do exist. The answer to this, however, should be improvement, not rejection: the fact that there are also pedagogically decent and attractive packages around means that there is no shortage of models.

Two key questions remain about teach-yourself packages, however:
- Do other learners share the researcher's view?
- Is teach-yourself an efficient and/or effective learning means per se?

Until the first question can be answered, these conclusions must remain provisional. As for the second, an answer would give an invaluable insight into a virtually unexplored language-learning process. If self-instruction's reputed difficulty turns out to be justified, however, and to lie not in bad materials but within the process itself, this is of little use to learners with no alternative to self-instruction. They would be best served by a course package that is not only methodologically as sound as possible, but that also guides them towards ways of compensating for the method's defects. Here, too, the checklist should be a key source of design ideas.

By looking at achievement as well as process data from a large number of learners, the Language Experience Survey should shed some light on the effectiveness of self-instruction. Before this, however, the second pre-study - the Learner Diary - will take an in-depth, longitudinal look at one learner's processes of self-instruction.

CHAPTER 4

PROCESSES OF SELF-
INSTRUCTION: A LEARNER
DIARY STUDY

# 4.1 Introduction

## 4.1.1 The diary and the project

The Literature Review (Chapter 2) has scouted out the fields of learner characteristics and strategies, of recommended self-instruction practice and materials design. The Packages Checklist (Chapter 3) has looked inside the published self-instruction package. The final field to be scouted is that of what the teach-yourself learner actually does: a look at a learning process, and its development over time.

## 4.1.2 Methodology: researcher diaries and case studies

Introspective methods are discussed in Section 2.7. To summarise, they appear to be an accurate and relatively straightforward way of finding out what goes on in the learner's conscious mind; disadvantages are that the exploration of subjective realities by subjective means can make it difficult to take objective distance, and that they can only access factors of which the learner is aware.

The introspection tool used here - the learner diary (cf. Bailey, 1983, in Ellis, 1990; Rivers, 1983; Waters *et al*, 1990) - is seen by Faerch & Kasper (1987a) as providing a valuable longitudinal record of the interaction between an individual and his or her learning processes; and Ellis (1985: pp. 101-102) reports that the diaries of sophisticated FL learners supply the highest-quality data.

Both credits and debits are accentuated when, as here (or with Rivers, 1983, for example), the applied linguist-researcher is also the (sole) subject. On the one hand, we get a triple subjectivity (researcher = observer = introspecting subject), with an increased danger of finding what one sets out to find rather than what is "objectively" there. Against this, it is difficult, if not impossible, to measure complex, consciously-driven strategic choices without some degree of verbalisation - at which subjectivity inevitably enters, like the wicked fairy at the feast.

But is subjectivity forever and irredeemably wicked? If the object of a study - especially a case-study, as here - is to discover individuals' reactions to the learning process, then one might argue that "subjectivity" (how one perceives the processes, what one chooses to record, etc.) is a prime research aim. More good fairy than bad, in other words. And if learner sophistication, as just mentioned, appears to increase the research value of diary methods, then having as learner/diarist someone, like Rivers, who is not only a sophisticated language learner, but also a sophisticated learning methodologist, ought logically to deepen insights rather than mask them.

In the end, however, the value of any case-study is limited by the individual factors affecting the learner(s) in question: cognitive and affective style, aptitude, L1, social and geographical setting, etc. (Skehan, 1989). This does not mean that a case-study is without value. However, as Abramson implies (1992: cf. Literature Review 2.7.2), its ultimate relevance can only be judged relative to a larger picture - a multi-subject survey, say, as in the present project. Then, Abramson argues, case-studies have a double value: they can generate hypotheses for the larger study, and also give insight into what the larger study's generalisations actually mean in human terms.

Hence the diary case-study here, which describes the researcher's own learning processes, should be judged as part of the research project as a whole. On the one hand, it aims to find out what questions would be worth asking the learners in the main study (Chapter 5). And on the other, it aims to provide detailed insights into the longitudinal development of a single learner, thus complementing the more generalisable but also more fragmentary cross-sectional snapshots of learner experience in the main study.

## 4.1.3 Aims and methods

### 4.1.3.a Aims

The basis for this study is a learner diary which records my own self-instruction of Hungarian over a period of 11 months.

Hungarian was chosen for two reasons. Firstly, because I had a strong motivation to learn it (see below). And secondly, because I also wanted to examine the strategies and processes which operate when one is learning a language without L1 or L3 cognates, whilst keeping the factors of script and culture constant (thus excluding oriental languages).

When planning the study, I deliberately held back from setting testable hypotheses. Thus the entries reflect whatever was uppermost in my mind at the time: as I was exploring what was virtually virgin territory in language-learning terms, I could expect most of my discoveries to be unexpected - which favoured a maximally open-ended approach.

### 4.1.3.b The learner

When beginning the project, I had self-instructed experience (with or without classwork strands) in 5 languages (Dutch, Italian, Serbo-Croat, Greek and Welsh), and class-only experience in another 6 (French, German, Latin, Macedonian, Chinese and Japanese): 11 languages overall. In the 70-learner main study, by comparison, the highest "solo/mixed" language count was 6, as was the highest class-only language count, and the maximum total language count was 10 (Tables 5.4.2/vi, /iii, /v respectively). In Abramson's terms (1992), therefore, this case-study explores not the typical, but the extremes of experience. My insights, however, are probably not only relevant to the 5% or so (3/70) with my level of experience, for the main study also shows that language-count effects on learning behaviour may fade out after as few as 3 foreign languages (Sub-Section 5.4.2.b.iv).

On the other hand, the findings may well be strongly conditioned by my own underlying learner characteristics. In terms of personality, I am a moderate introvert (scoring 9 on the Eysenck scale: Eysenck & Eysenck, 1991), and - as an academic - almost certainly studial in learning style. I have no external evidence for other learner characteristics that might affect language learning - except, of course, for my male gender.

Extrinsic motivation for learning Hungarian was high. Since my teenage years I had spent regular holidays with ethnic Hungarian friends and their families from Novi Sad

in Northern Serbia - friends who, during the period of the diary, were driven into exile by war and fascism. On the other hand, I had already tried to learn the language twice, and failed - which could have built up the expectation that I would fail again.

### 4.1.3.c The learning process

My starting-point I judged to be false beginner/elementary - points 2/3 on the IELTS-based 9-point proficiency scale (Item 2b.6 on the Package Checklist in Chapter 3). With an average of six ±30-minute learning sessions per week, mostly in the bus or train to and from work, I progressed to about point 5: "rough-and-ready command of a good range of situations". This rating was confirmed by my ability, on visiting Hungary the summer after learning had stopped, to handle most tourist situations, and by my inability to join in multi-party conversations not specifically toned down to my level.

The Hungarian language, according to Section 1 (Language-Contrastive Factors) of the Checklist Taxonomy in Chapter 3 (q.v.), has:

★ an easy phonology:
   • only 3 non-English phonemes or sound-letter links: /y/, /y:/ and /ɒ͜ɔ/ (letter "a");
   • there is a stress/unstress system, and the stress is always word-initial;
   • no fixed intonation contours or tones.

★ an easy script: phonetically consistent Western.

★ a difficult lexis: few if any L2 words are similar to English.

★ a moderately difficult grammar:
   • agglutinative;
   • SVO with topic-structure conditioned variants.

The assumed yardstick for the language-difficulty profile is English; for an individual learner, however, one should also include L3 knowledge (Literature Review 2.3.4). This changes the picture only slightly: /y/, and by extension /y:/, were familiar to me from German, and the topic-structure-conditioned word-order from Slav languages. But that

was all. Virtually the whole of the lexicon, apart from the occasional internationalism (like *televizió*) or Slav borrowing (like *szerda* - "Wednesday"), was non-Indo-European and thus utterly unfamiliar[13]. This includes agglutinative morphemes, of course: the fact that a few grammatical concepts were familiar from other languages was of no help whatsoever in learning their realisations.

The course packages used - Bánhidi *et al* (1965) and Erdős *et al* (1982) are analysed in detail in Section 3.3.2. No recorded materials were used, though I could have borrowed recordings of Bánhidi's expository texts. I already believed myself familiar with Hungarian phonology, however, from my many visits to Hungarian-speaking families. Native-speaker contact was restricted to 3 weeks in the 8th month.

### 4.1.3.d The diary

In order to combine record-keeping with language practice, the diary was written in Hungarian throughout (apart from an English judgement on the process of writing the first entry). This was a hard, dictionary- and grammar-bashing task at first, but one which became gradually easier. The sheer effort of writing the diary in the foreign language, however, probably meant that entries were not as frequent as they might otherwise have been.

From first (26. November 1991) to last (29. October 1992) there are 21 entries, covering 10½ hand-written A4 pages in all (see Appendix A4.i-ii for a sample page and translation). Intervals between entries range from almost 2 months (over Christmas and summer) to 1 day; length of entries varies from 1½ pages to 2 lines. The irregularity of entries is not only due to holidays: as I describe below, the learning process was far from even. During periods of stable materials- and strategy-use, entries tend to be short and infrequent. These periods, however, were interspersed by paradigm-shifts when the number of new insights - and hence diary entries came relatively thick and fast.

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[13] In lexical terms, Hungarian is very much an isolate: there are virtually no recognisable cognates even with Finnish/Estonian, its closest relative.

Just as brief notes in a writer's diary, even years later, can unlock whole experiences in a depth and richness of detail well beyond the jottings on the page, so some of my observations here were unlocked by, rather than described in, the learner-diary entries. This is potentially an even greater source of unreliability, to which I would put up two counter-arguments. One is that, with external subjects, diary entries are often backed up by interviews with the learners, which would provide a similar depth of detail. The other, once again, is Abramson's argument (1992) - that as long as we have a more objective, multi-subject study to back up case-study findings, subjective depth is the purpose of the case-study, not a hindrance to it.

# 4.2 Insights

Here, rather than presenting the full text (as e.g. Rivers 1983), I discuss certain key themes which the diary revealed.[14]

## 4.2.1 Learning

### 4.2.1.a. Thresholds

The most striking fact to emerge was that learning strategies were not static or even evolutionary, but appeared to undergo radical shake-ups as developments in underlying proficiencies fed each other and permitted new strategies to come into play.

For the first few months I relied heavily on studial, conscious-intake strategies closely linked to the syllabus and activities of the textbooks. I read presentation texts. I constructed a loose-leaf bilingual dictionary (English⇨Hungarian), which I used for memorising words and examples of use. I skipped most of the formal grammatical exercises because of their dullness, which meant that - except for occasional free writing and oral translations - I did relatively little output practice work.

The diary often records the dominance of vocabulary study:

> I spend most of my time processing and studying vocabulary: I have no
> time for the other things. I feel guilty; but I don't know if this is a true
> problem or if it originates from methodological belief.

[7 months][15]

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[14] Reports on this study have been published as Jones (1994) and Jones (1995b).

[15] Diary comments are translated from my learner Hungarian. Text originally in English is italicised, and explanatory comments are given in [ ]. Dates are in months from the first entry.

Around the time of this entry, however, I noticed that I seemed to be crossing the first of two thresholds - a lexical one (cf. Literature Review 2.3.5). Because of a lack of cognates and internationalisms (not only is Hungarian non-Indo-European, but it prefers to coin from its own resources rather than to borrow), mastery of a core working vocabulary had been agonisingly slow. On the other hand, this internal etymological consistency meant that, now my stock of word roots had grown, derivates were rapidly becoming more and more transparent. An early realisation of this process had already led me to adopt etymology as an active strategy:

> I have begun learning words by word-family: e.g. bátorság [courage] -
> bátor [courageous] - bátortalan [faint-hearted] - bátorít [encourage]. If I
> can learn enough of the language's general "bricks", it will be a lot easier...

[2½ months]

> I used the dictionary for finding word-roots.

[3½ months]

> I recognise more and more often the bricks of new words
> (threshold-effect); hence the work of learning is becoming easier and
> easier.

[4 months]

This "easification" of learning seemed to snowball as greater knowledge of Hungarian's basic lexemes enabled L2 etymology to play a role in generating keyword images for vocabulary learning:

> I'm slowly changing mother-tongue strategies ("imagery", e.g. szamár
> [donkey] → Lada Samara) for target-language ones ("etymology" - transfer
> - e.g. műsor [programme] → mű [work] + sor [order]).

[4½ months]

Brown and Perry (1991: Literature Review 2.3.3.e) report that a combination of visual-acoustic and semantic processing strategies appears most effective in vocabulary learning; arguably, learning by etymological metaphor unites both processing types.

This in turn soon brought me to a second, "real-text" threshold:

> Fantastic feeling: I can read many magazine articles without a dictionary...

[10 months]

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The notion of a threshold effect in L2 reading (rather than a gradual increase in the ability to cope with authentic texts) is confirmed by Hirsh and Nation (1992: see Literature Review 2.3.5). The ability to cope with real text prompted another, more radical change in learning strategies, from studial to comprehensible-input:

> I've just realised that I've completely stopped using my coursebooks. Real reading matter is much more interesting!

> [9½ months]

Nevertheless, I soon felt that a complete switch from studial to naturalistic methods risked stagnation of my underlying knowledge base - a danger mentioned by Dodson (1986) and other authors in connection with immersion learning. Though I seemed to be learning many new compounds/derivates (both productively and receptively) and increasing my reading fluency, I appeared to be acquiring few new underlying lexemes or grammatical particles - perhaps because, as Hirsh and Nation report, most word-families outside the core 2000 are "one-offs", unlikely to recur frequently enough for even a recognition command to be built up (cf. Parry, 1991: Literature Review 2.4.3.c.ii). Intake of new word-families and grammar appeared at least partially dependent on medium-focused tasks (Dodson) such as dictionary work, grammar look-up or memorisation - techniques which Parry sees as more effective than exposure in the case of low-frequency (vocabulary) items.

Thus I found myself adopting a cyclical medium⇔message focused approach. On the one hand, engagement with authentic text seemed able to trigger the longer-term acquisition of laboriously memorised items:

> At last I managed to remember a word... because I read it in a magazine article!

> [10½ months]

"Krashenite enlightenment", however - items and structures becoming transparent through textual input alone - appeared persistently denied to me. Subsequent reading of "the rule", by contrast, often brought flashes of insight:

> I have decided to read the grammar book (Bánhidi) right to the end. Many
> things which I read earlier but did not understand (e.g. bajlodnia [for you
> to bother]), became clear in a moment!

[11 months]

Moreover, fluent productive command of this declined-infinitive form swiftly appeared

in my writing. The written rule, it seemed, had supplied a clear solution to a

cognitively-foregrounded problem; and the solution was one which I must have been

cognitively/developmentally ready to take on board (Pienemann, 1992: cf. Literature

Review 2.3.3.f). In other words, theoretical knowledge and real-text experience seemed

to work most efficiently hand in hand, as Ellis R. (1990: Literature Review 2.3.3.b)

claims.

### 4.2.1.b Autonomous learning

Autonomous work did not only take place after the thresholds just mentioned. Even

during the first phase of learning, I tried various self-designed activities: a short-lived

attempt to write a diary of the week's (non-language-learning) events; or a game where I

tried to describe a page from a children's picture dictionary from memory, as in Figure

4.2.1/i on the following page.

## Figure 4.2.1/i

## Describing a picture from memory (Scarry, 1986)
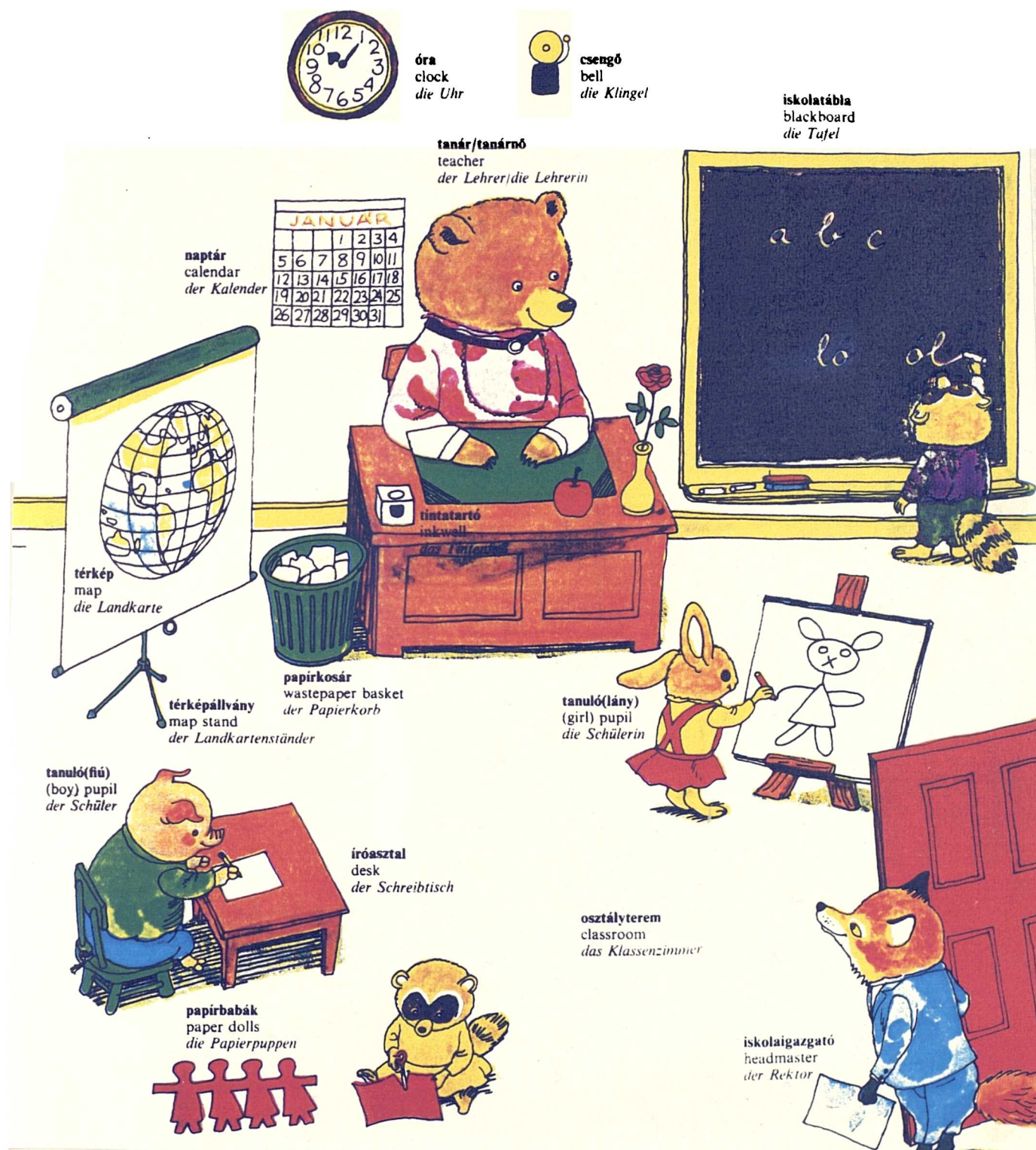
Self-designed pedagogic tasks, however, required a fair amount of effort, both in design and in language-output checking (even for a language teacher like myself); hence most were quickly abandoned in favour of the easier options of working through the textbooks or learning vocabulary lists. Post-threshold language-use tasks, by contrast, such as reading popular magazines or doing crosswords, required no actual design or output-checking effort, and so quickly became a regular part of my learning routine.

### 4.2.1.c Forgetting

Before the thresholds, lack of reinforcement of memorised input by practice or real-text input meant that attrition became a problem:

> Big shock: I began revising all the vocabulary from my file: I remember
> almost nothing! [...] If you don't use it, you lose it!

> [5 months]

On the other hand, this "attrition" may just have been a sign of the inevitable gap between active and passive vocabulary - an impression confirmed during the second phase of learning, when many of these "forgotten" items were recognised during reading.

## 4.2.2 Grammar

As Hungarian grammar is complex, it would seem that an ability to handle it would be an important learner aim. In my case, however, grammar turned out to be a much lower active learning priority than lexis, at least in terms of learning time. Three main reasons spring to mind for this imbalance:

★ I had retained some grammatical knowledge from my earlier attempts at the language, so much grammar work was revision.

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★   A language's grammar contains a limited number of items, whereas its lexis is vast. By the end of the first phase of learning I felt I had "covered" Hungarian grammar, whereas I had enough lexis for only very limited real-life interactions.

★   The relatively stable 1:1 form:function mapping of Hungarian's morphology grammar meant that many forms were guessable in reading, and that I could get away with near misses in speaking and writing.

This non-perfectionist approach to grammar, however, contrasted sharply with its primacy in both textbooks.

For grammar memorisation, holophrastic examples of use (especially if selected by myself) appeared more readily usable for production and reception than noun and verb tables (Weinert, 1995, etc.: see Literature Review 2.3.2.d), though the tables helped focus knowledge beforehand and consolidate it afterwards.

As for practice, research (Literature Review 2.3.3.c) indicates that formal manipulation is less effective than message-based work for the automatization of grammar. I found that this might be linked - in part at least - to motivation. Free to choose my own activities (unlike classroom learners), I avoided grammar drills because message-based work - especially personalised (coursebook essays on "my family", real-life letters, learner diary, etc.: cf. Campbell and Kryszewska, 1992) - was simply more enjoyable.

Personalized writing, however, also involved much investment of time and effort. In other words, it presumably aided acquisition not only through the "deep" semantic processing needed for handling real messages (especially after an earlier "shallow" rote-learning stage: Brown and Perry, 1991), but also through repeated working-memory overload - which is perhaps the underlying reason for the oft-cited value of "deep" processing. By contrast, the most efficient strategy for coping with grammar drills appeared to be a tunnel vision approach (only think about the element to be changed), which put little pressure on working memory.

As mentioned earlier, beyond the real-text threshold I found myself reading about grammar in conjunction with real-text input. By this time I had abandoned not only formal manipulation exercises, but also the rote-learning of grammar tables.

## 4.2.3 Vocabulary

I have already mentioned the primacy of vocabulary work, and my goal of reaching a lexical threshold after which guessing and learning of new compounds and derivates becomes much easier.

The most common method of vocabulary presentation, adopted by both of my courses, is by semantic field: the "Unit 4: Transport" approach. It has the unquestioned advantage of overall coherence; I did, however, encounter two problems. One is that of generalisability:

> In the Bánhidi book: they often give not the main meaning of a Hungarian
> word, but a rare one (for "csatorna" they give not "*channel*" but "*gutter*").
>
> [4½ months]

This, I suspect, is a problem of situational/semantic-field syllabuses in general: a real-life situation which prompts an item's core - i.e. most generative - meaning may be rarer (and thus later in the syllabus) than one which prompts a derived meaning. Conversely, however, presenting lexis in terms of word-families or even cross-language puns might encourage more efficient learning (especially considering the "interference effect" reported for memorising by semantic field: Tinkham, 1993), but would make for a very incoherent syllabus[16].

Semantic-field syllabusing is also useful for reference. Here the traditional "teach the lot" approach (the inevitable "Visit to the Doctor" unit of Bánhidi *et al*, for example, teaches "gall bladder" and "kidneys" at the same time as "My arm hurts"!) actually has a lot to recommend it. With such an approach, however, the learner needs to distinguish between production, recognition and reference items - a frequently-counselled strategy for dealing with new-lexis overload. In practice, however, it turned out to be irksomely time-consuming to go through a printed vocabulary list and mark items even according to a two-way classification (learn or don't learn); thus I usually found myself attempting to memorise every single item - or simply giving up the attempt.

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[16] This is Roberts' criticism (1992, 1995) of the inaptly-named *Magic Memory Method*, a course package that has presentation via English-L2 puns as its sole pedagogic activity.

Usefulness of vocabulary was a key criterion; here I felt that Erdős performed better than Bánhidi. This was a question of both modernity and usefulness (also mentioned as key criteria by learners in the main study: 5.4.4.f.ii):

> I'm afraid that the vocabulary in the Bánhidi/Jókay/Szabó book isn't modern enough. And in the Erdős etc. book there are useful expressions, which there aren't in the other book.

> [4 months]

For memorisation, I preferred a holophrastic strategy, as with grammar -

> It seems that it is easier to learn sentences or expressions instead of lone words.

> [3½ months]

- but with two riders: firstly, that holophrases from a real text of interest to myself seemed most memorable; and secondly, that they should preferably contain no new lexis besides the target item (two conditions which unfortunately often conflicted).

Nevertheless, *all* my conscious strategies of lexis-handling (dictionary look-up, inferring from context, etymological analysis, recording, memorisation) were bilingual (Dodson, 1986), i.e. using my L1 as a point of reference. This, it might be argued, is a product of conditioning or learning style. Dodson, however, looking at language acquisition in bilingual children, sees contrastive techniques as fundamental to the gaining of controlled L2 knowledge by learners of all ages - in other words, as an efficient, not an erroneous learning means.

Similarly, I found the bilingual dictionary a vital tool for reception and production, as Béjoint and Moulin (1987) stress. A dictionary need not only be stand-alone: in many cases, the two-way language dictionary at the back of Bánhidi was adequate. Erdős, of course, as the more modern package, did not have an English⇨Hungarian dictionary, which unreasonably handicapped access to its vocabulary content (cf. Checklist Survey comments in 3.3.1.a).

## 4.2.4 Writing

My isolation inevitably meant that this was the main productive skill practised. I eventually reached what felt like a satisfying fluency in genres that had initially appeared difficult:

*It's difficult to keep learner diary in L2!*

[English footnote to 1st entry]

It's getting easier and easier to write my learner diary in Hungarian. I believe I now know enough vocabulary. And of course my knowledge of Hungarian is bigger.

[4 months]

As for practice means, translation exercises had a certain crossword-puzzle enjoyability, and provided direct feedback: cf. the main study (5.4.4.h.ii), where translation activities get a strongly positive rating. Personalized coursebook writing tasks (e.g. "Describe your room": Bánhidi) were also enjoyable, as was the real-life task of writing to Hungarian friends.

## 4.2.5 Reading

The importance of the real-text threshold in strategy terms has been described above. Crossing it also boosted motivation ("I even enjoy reading on the bus!": 10½ months) - note the statistical links between reading and motivation in the main study (5.4.4.b) - and enabled personalization of vocabulary learning.

"Trashy" texts (popular press, comics) scored the highest on all counts: short in length, appealing in content, with simple syntax to cut down the processing load, they presented well-contextualized vocabulary that could be relied on to be of current use (which Bánhidi most definitely did not!). Coursebook texts, by contrast, ranged from the stuffily worthy to the dire; moreover, any feeling of achievement in coping with one presentation text was invariably deflated by my being confronted with a far more difficult text in the next unit.

## 4.2.6 Pronunciation

This area is conspicuous by its absence in the diary. It appears only once, in the first entry:

> I read the introduction (on phonology) and the first lesson.
>
> [0 months]

There are several reasons why it did not appear to a major issue. As already mentioned, I was familiar with the sounds of Hungarian from native-speaker friends. In addition, reading the phonology section of the coursebook at the beginning of the diary period made sense of my experience (just as reading rules made sense of real-text input in the field of grammar). A major factor, however, must be the Hungarian orthography, which not only uses Latin script, but has a one-to-one sound-symbol correspondence. Coupled with the blessing of a fixed word-stress (first syllable), this meant that a word's pronunciation could be learnt simultaneously with its written form, and rapidly faded from conscious view.

My experience here, however, may not be universal. Though the main study confirms pronunciation as a relatively low priority (mentioned by only 26/70 interviewees), it shows that learners vary as to whether they find written phonetic descriptions usable, and that a written pronunciation overview may be of little use as an *initial* encounter with a language's phonology (Sub-Section 5.4.4.d.ii).


## 4.2.7 Speaking

As predicted, gaining fluency in this area was problematic whilst I had no study buddy or native-speaker helper to talk with (Dickinson, 1987). Sub-articulation and "thinking in the language" are sometimes recommended (e.g. Doyle and Meara, 1991); though I found myself doing this whilst alone, it appeared to have no consciously observable effects on my performance with a real interlocutor - perhaps because real interlocutors allow you much less message formulation time!

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Nevertheless, it was surprising how quickly the knowledge from months of language study became available in speaking. In the course of conversations with a native-speaker in the 8th month, it took about 5-6 hours to build up reasonable conversational fluency. Though oral output practice is vital for spoken fluency, it seems that it need not happen in the same time-frame as input. If this experience - one at odds with a core assumption of recent classroom methodology - is generalisable to at least some other learners, it removes one of the key theoretical objections to self-instruction: that its lack of interactive practice is an insurmountable barrier to oral fluency.

Two factors seemed to aid fluency. Sometimes automaticity seemed to be already in place - perhaps because, as Meara (1993) implies, underlying lexico-grammatical access was reasonably fast as a result of free writing (cf. skills transfer discussion in Literature Review 2.3.2). At other times, communication strategies (Bialystok, 1990) played an important time-winning role in enabling conscious ("controlled") searches to take place, many of which then became automatized:

> An interesting process: in the beginning I was very shy, I didn't even dare open my mouth; later, however, I managed to use the words I knew.
>     "Communicative strategies" are the bridge between "*learning*" and "*acquisition*": they slow down output until one can process all parts of the message (communicative/personal meaning, vocabulary, grammar, etc.).

[9 months]

## 4.2.8 Listening

I did not use Hungarian listening materials; in any case, I only had access to recordings of Bánhidi's old-fashioned, stilted reading texts, which had no intrinsic motivating quality. As expected, when I had the opportunity to interact with native speakers (8th month), understanding them proved difficult. What I had not reckoned with, however, was that, in contrast to speaking, this hardly appeared to improve over time. The Diary gives the key reason:

> The only "*skill*" in which communicative strategies do not succeed in
> slowing down the message is listening!!
>
> [9 months]

In speaking, as with reading and writing, the learner can win time to access controlled knowledge and assemble it into meaningful utterances. With listening, however, I had little influence on message speed: negotiation strategies, if used more than occasionally, quickly became tiring for both parties, as well as threatening my face as a conversational partner. The main study (5.4.4.b) reveals, however, that cassette work may not have greatly improved my ability to understand native speakers: intensive, pause-rewind cassette listening on the one hand, and hang-on-for-dear-life real-interlocutor listening on the other, appear to be two distinct skills, with ability in the latter being as much a product of overall proficiency as of focused practice.

## 4.2.9 Motivation

Motivational factors appeared to play a large part in my survival as a learner. I began with high overall and integrative motivation, as already mentioned. During the learning process itself, this was augmented by intrinsic/task motivation from such activities as real conversations and authentic, enjoyable texts. One must not ignore the extrinsic motivation supplied by the fact that my learning experience formed part of a research project (thus justifiable as "work" rather than "pleasure"!). In addition, the creation of a regular routine (nearly all my studying was in the bus or train to and from work) appeared vital in maintaining momentum - a fact confirmed not only by Doyle and Meara (1991), but also by a good number of main-study learners (5.4.4.j.iv).

As Doyle and Meara point out, however, language learning quickly provides rewards and motivation of its own. In my experience, not only did it bring intellectual excitement and a feeling of achievement, but the seeking of native-speaker contacts also led to new friendships, providing yet more integrative motivation.

# 4.3 Evaluation

## 4.3.1 Learning implications

In second-language learning theory terms, this study appears to confirm the 3-way mixture of explicit form-focus, textual input and realistic output practice favoured by a number of recent researchers (e.g. Spada, 1986; see Ellis R., 1990 for overview). More specifically, it confirms findings by researchers such as Laufer (1994) or Hollander *et al* (1995), that comprehensible input alone is not an efficient means of raising L2 competence - in contrast to the much louder claims of Krashen (1985), etc.

A finding with much less precedent in the literature, however, is the possibility that language learning - at least with an L2 with a completely unfamiliar lexis - may operate in two stages: a stage of slowly internalising enough of the lexicogrammar to cope with real-life texts and interactions, followed by the ability to use real-life texts and interactions as a learning means. If this holds true for other learners, full autonomy - whether defined as freedom from the teacher or from the structured learning package (cf. Section 1.2) - would seem to have most chance of helping learning at the second rather than the first stage.

What literature there is on the topic of proficiency thresholds (see Literature Review 2.3.5) does not distinguish between a "lexical" and a "real-text" threshold. The real-text threshold may well be the more crucial, in that it provides the push from package-based to real-life strategies. Recognising word derivations, however, may be a key enabling skill, as Hirsh & Nation (1992) imply when they define their real-text threshold as lying at about 2000 "word-families" (word-sets based on the same core lexeme, like the *bátor* group quoted above) rather than 2000 words. To keep matters simple, I will henceforth talk of "a threshold" rather than "thresholds" - though we are almost certainly talking of a cluster of abilities and strategies here.

The Diary's identification of lexis as the key long-term learning aim - being a knowledge (like grammar) that powers all productive and receptive skills, but one

(unlike grammar) that can never be completely acquired - also has some echoes in the literature (see discussion in Literature Review 2.3.3.e).

Another important finding is that package use is only part of the learning picture. Thus one of the premises underlying the Package Checklist, i.e. that packages should be well-designed because they are crucial to the self-instruction process, is given only partial support. Packages were used, it is true, intensively and for a sustained period up to threshold level; in fact, it is difficult to imagine self-instruction at low proficiency without a package's guidance, at least outside the L2 country. But even in the first phase, before the threshold, a learner may begin developing independent learning and practice strategies. Conversely, in the second phase of learning, though the accent may shift to autonomous input and output work, a studial-input/reference role for the coursebook still remains.

It is an open question whether more package work would have been described had the packages used here been more methodologically up-to-date or intrinsically interesting. One possible solution to defective packages, however, may be to use the best bits of several packages - a strategy also recommended by a sizeable minority of main-study interviewees (Sub-Section 5.4.4.m.i).

## 4.3.2 Materials design Implications

If, as I found, the nature of the learning process changes radically at certain proficiency thresholds, one should not expect coursebooks to follow the same format in Unit 30 as in Unit 1. Below the real-text threshold, this study argues for a focus on building up lexicogrammatical knowledge, avoiding the two extremes of dominance of grammar and excessive vocabulary input; there seems to be a case for both studial input work and personalised output practice, but not for controlled grammar exercises.

Once a threshold goal has been reached (about 2000 word-families, perhaps: Hirsh & Nation, 1992), the textbook should perhaps deconstruct itself, pointing the learner outwards to authentic sources of input and output practice. On the other hand, as it appears that the wholesale abandonment of studial strategies can lead to stagnation of

the knowledge base, there is still a need for intensive lexical input and advanced grammar work after this level.

For vocabulary, semantic fields appear good for overall syllabus coherence and reference value. It might, however, be worth adding activities exploring the families and core meanings of key "building-brick" lexemes as they occur. For grammar, explicit, well-indexed descriptions are *de rigeur* (something the main-study interviewees also stress: 5.4.4.e.iii), backed up by real-text input and real-message output activities. In skills terms, reading texts should be short, bright and interesting; writing tasks should be personalised; a certain amount of ingenuity is needed to find speaking practice (here the textbook has a clear duty to advise the learner); and the need for listening practice is ignored at the learner's peril!

## 4.3.3 The Diary Study and the project

The question is, of course, how many elements of the strategies and processes described here *are* generalizable to other self-study learners. Would other learners, for example, benefit from an initially highly-cognitive, coursebook-based approach followed by an integration of study and naturalistic means?

Also, how many of these experiences are language-specific? The lack of lexical cognacy, for example, was perceived as a key problem by the researcher - but does the inverse hold true, i.e. that cognacy is always a key learning strategy when a cognate language is already known? What happens in languages where there is a wider and better range of packages? Or when script and culture differences enter the picture? Is there evidence for threshold effects in other languages?

Most of these questions should, it is hoped, be answered by the Main Study that follows - a wider look at the experiences of a larger number of learners.

# CHAPTER 5

# LANGUAGE EXPERIENCE
# SURVEY

# 5.1 Introduction

## 5.1.1 Chapter overview

This chapter describes the key phase of this project: a survey of learners' own experiences of independent language learning. This section discusses the research methodology used, and details the aims of the survey. Section 5.2 looks at subjects and sampling, and 5.3 at data gathering, coding and analysis procedures. Sections 5.4 and 5.5 present and discuss the results respectively.

## 5.1.2 Research methodology and aims

As a language teacher and learner, it is my firm belief that learners' own learning experiences and learning models should act as the foundation of any language-training methodology. This is not to downplay the roles of learning research and of creative innovation by educational professionals. But without a firm base in learner behaviour and perceptions, any innovation risks being hard to sell at best, and hindering learning at worst.

Moreover, I set out, in this doctoral project, to map a largely unexplored field. To have followed the classic experimental paradigm, testing binary hypotheses about a small set of variables, I would have needed a model of the field in question: otherwise, selecting what variables to study would have been sheer guesswork. As no such model appears to exist for self-tuition in language learning, the overall purpose of this project has been to construct one.

By now, tentative outlines of a model have begun to emerge. The pre-studies have indicated that a published teach-yourself package should perhaps be seen more as a heterogeneous learner resource pack rather than a homogeneous determiner of learning. Learner strategies appear essential in order to fill out lacunae both in the package(s) used and in self-instruction per se. Self-instruction might well show a two-phase

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sequence: an initial skill-getting phase with strong reliance on the course package and studial strategies, followed by a more skill-using phase when the balance shifts to work with authentic texts and native-speaker interaction.

The main study, which is described here, attempts to complement these insights from a single learner, albeit a language professional, with those of a larger number of learners. The research process is still "heuristic" (Seliger and Shohamy, 1989: p. 29ff) rather than "hypothesis-testing": it was felt that a maximally open-ended questioning strategy, with categorisation after data-gathering rather than before (as in Tarone's learning-strategies research of 1980, cited in Scholfield, 1995: pp. 36-37), would provide the widest possible overview of the self-instruction landscape.

The data is derived exclusively from learner interviews, i.e. it is introspective, with a relatively long time-gap between behaviour and reporting (cf. Literature Review 2.7.3). A key model here was Naiman *et al*'s seminal *Good Language Learner* study (1978), where interviews were used to profile adult L2 learners and their strategy-use; direct observation, by contrast, was found to yield little useful data.

Another limitation of externally set and observed tasks, however - whether analysed in product (e.g. proficiency-rating) or process (e.g. strategy-use) terms - is that they give a detailed view of what are perforce a small number of areas. This project's aim, by contrast, is to explore the teach-yourself phenomenon as a whole, including as many as possible of the various forms that it might take. The most effective way of getting at these forms was therefore felt to be, quite simply, to ask as many learners as possible to describe their past and present experiences, without restriction on what they considered relevant.

But what about the central, crucial risk that the data may be warped by the learners' subjectivity? Much of the present data concerns learners' post-hoc *perceptions* of their abilities, success, strategies, etc. - which may well differ from actual performance (Scholfield, 1995: pp. 64-66; cf. Literature Review 2.6.1 for unreliability in proficiency self-assessment). A counter-argument would be that if we were to iron out this warp, we would iron out a crucial dimension of the learning process (cf. discussion in Learner Diary 4.1.2). Learning, after all, is done by learners, which implies that their subjective perceptions, their post-hoc idealizations and forgettings, should be seen less as

disrupters than as forces of cohesion - defining relationships and priorities between factors, and setting plans for future action. And there are other arguments. The attitude-motivation complex, for instance, a key factor in language learning (2.4.2.b), is by definition based on internal reality; and externally-applied standards probably have less to say in solo than in classroom language learning. Nevertheless, the potential distance between reported and real behaviour should be borne in mind throughout this study.

In practical terms, an open-ended interview study of a large number of subjects risks resulting in an enormous and unwieldy mass of descriptive data. To enable significant patterns to emerge from the mass, multivariate statistical methods were used (detailed in 5.3.4). These gave a quantitative skeleton, which could then be fleshed out by a qualitative examination of the learner protocols - the twin-track approach advocated by Mitchell (1985, 1989).

## 5.1.3 Detailed objectives of the survey

The survey aims to establish and examine patterns of:

- experience and opinions of published self-instruction materials;
- reported learning strategies for self-instruction;
- perceptions of other factors which might affect the self-instruction process.

against a background of:

- language experience (number of languages studied, proficiency, cognate languages known);
- the interaction between classwork and self-instruction;
- the role of the L2 environment;
- perceptions of success and failure;
- drop-out.

These form the study's target variables, whose interaction is analysed in multivariate rather than dependent/independent terms (cf. Scholfield, 1995: pp. 25-29).

Potential disruptors are background factors such as gender, mother tongue, educational culture, age and social/professional background. Of these, the following is screened as a potential variable:

- gender

and the following are controlled:

- mother tongue/educational culture (all interviewees are native English speakers);
- age (all interviewees are adults).

In the absence of any generally-agreed taxonomy, it was judged impracticable to screen or control social/professional background; the social/professional structure of the subject population is discussed, however, in Section 5.2.3 below.

## 5.1.4 Pilot study

A pilot study was carried out with the aim of identifying a productive subject population and trialling data collection techniques.

Two subject groups were used: 14 adult members of the public doing evening classes at Newcastle University's Continuing Education Department, and 9 staff/students registered as Users of Newcastle University's Language Centre self-instruction audio and video lab. Though both groups generated suitable subjects, the latter turned out to be more productive in accessibility and random sampling terms (NULC Users were registered on a database containing over 1500 learners plus their phone numbers).

The questionnaire was gradually refined, and a GROUP/Keyword system of classifying open-ended responses was developed - though its participant-generated, "ethnomethodological" nature meant that responses in the main study might well supply further Keywords (as was indeed the case).

The data from 9 of the 23 subjects was judged suitable for re-use in the main study, and a further 3 were re-interviewed.

# 5.2 Languages and Subjects

## 5.2.1 Learning Means

The pilot study indicated that, when looking at individual languages, a mixture of class-work and self-instruction, whether in succession or in parallel, was more the norm than the exception. Thus the main study posits three main language-learning "modes": Class-Only, Mixed-Means, and Self-Instruction-Only. Though "naturalistic languages" (i.e. those learnt solely by immersion in the target-language environment, without studial means) were logged, and contribute to *Total Language Count*[17], they were too few in number (13 tokens overall) to be worth analysing. The learning modes focused on are detailed in the following Table:

**Table 5.2.1/i**

**Main Learning Means: terminology used**

| Cover Term | Class-Only | Solo/Mixed | |
|---|---|---|---|
| Mode | Class-Only | Mixed-Means | Self-Instruction-Only |
| Self-instruction used? | ✗ | ✓ | ✓ |
| Classwork used? | ✓ | ✓ | ✗ |

For a language to qualify as Mixed-Means, it must have at least one distinct **self-instruction "strand"**, i.e. a long-term learning element that is decided on, planned and executed by the learner herself, whether in sequence or in parallel to one or more class-work strands. If the only independent element, by contrast, is teacher-set homework, teacher-directed self-access, or "teacher-led autonomy" (cf. definitions 1.1.3) the learning mode is regarded as Class-Only.

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[17] Italic script denotes variable-names throughout the study.

As this project aims to explore the self-instruction phenomenon, the presence or absence of self-instruction per language learnt is obviously a key factor in a subject's language profile. For the sake of brevity (in labelling variables, etc.), the cover term "Solo/Mixed" was used for the two modes containing self-instruction (Self-Instruction-Only and Mixed-Means).

## 5.2.2 Subject sampling

This went through the following stages:

| 1 |
| :---: |
| NU Language Centre User Database |
| → over 1500 staff, students and public |

⇩

| 2 |
| :---: |
| EFL learners and non-British surnames excluded |
| → native English speakers only |

⇩

| 3 |
| :---: |
| Users on language-class registers and modern-languages undergraduates excluded |
| → c. 525 potential subjects |

⇩

| 4 |
| :---: |
| uncontactable Users dropped, non-self-instructed learners excluded |
| → 56 telephone interviewees |

⇩

| 5 |
| --- |
| 9 recycled and 3 re-interviewed pilot-study subjects included<br><br>→ 68 telephone interviewees |

⇩

| 6 |
| --- |
| 2 volunteer Users for taped protocols included<br><br>→ 70 interviewees |

## 5.2.3 Generalizability

Though this process resulted in random sampling of the Stage 3 population, one must ask how typical the latter is of self-instructed learners in general.

Two-thirds (47/70) of the interviewees were university students or academic staff, the other third (23/70) being non-academic staff or members of the public. This probably biased the sample towards higher intelligence, and almost certainly towards general academic success (an important language-learning factor: Skehan 1986). Both factors, plus institutional support for the languages being studied at time of interview (Rybak 1983), probably increased the likelihood of language-learning success in the sample. There might potentially also have been a bias towards studial learning style (Literature Review 2.3.4.c.ii), though no evidence was actually found for this (cf. 5.5.3.b).

In order to target phone calls more effectively by cutting down on homework/self-access-only Users, those known to be in language classes were excluded at Stage 3. Any falling through the net, however, were interviewed at Stage 4 if they turned out to have self-instruction experience. In biasing against modern-languages undergraduates, the population became less representative of the typical university language centre; on the other hand, reducing domination by younger adult learners with high classroom proficiency may well make the findings more generalisable beyond the university setting.

The fact that the initial point of contact was an audio/video lab (though interviewees' experience ranged far beyond this particular setting) could have given an "untypical"

The fact that the initial point of contact was an audio/video lab (though interviewees' experience ranged far beyond this particular setting) could have given an "untypical" concern with listening-based materials and strategies, and a greater range of available materials than in the case of the isolated home learner.

Because of her very isolation, however, it is extremely difficult to define - let alone contact - the "typical" home learner. Access to continuing and higher education means that many self-instructed learners are in the same undoubtedly privileged situation as my subject-group. On the other hand, it is almost impossible to tell how many do not have access to a self-access learning centre of some description. Ways of contacting non-institutional learners were considered, but proved unworkable. The main publishers are unwilling to release sales figures, and letters written to the BBC, Teach-Yourself and Linguaphone went unanswered. One possible idea - that of contacting buyers by putting cards with my phone number into packages in bookshops - was soon rejected: the return rate would have been slow and low, and the self-selection factor would have made any results questionable. Anyway, as discussed in 3.1.3, packages may be bought but not used; or bought second-hand, or borrowed.

In other words, it is hard even to estimate the relative proportions of "institutionally-supported" and "unsupported" self-taught learners, and thus their relative importance in research terms. In default of such knowledge, it was decided to opt for the advantages of a large and easily-accessible (thus non-self-selecting) pool of subjects: registered Newcastle University Language Centre Users with self-instruction experience. Moreover, this population seemed to have enough internal variety (university students, academics and outsiders/non-academic staff) to enable meaningful generalisations to be made outside their particular subject pool. In addition, it must be borne in mind that the subjects were asked about all their language-learning experiences, not merely their ongoing ones: interviews revealed that many self-instruction experiences were in fact "institutionally-unsupported".

In conclusion, I would claim that my findings are probably typical of British learners with access to the institutional support offered by a higher-education institution. Extension of findings to learners without access to such support can probably be made, albeit

cautiously, as long as one bears in mind the potential effects of the sampling biases mentioned.

# 5.3 Data Gathering and Processing

## 5.3.1 Data gathering and storage

I myself interviewed all subjects - by telephone, except for 2 face-to-face interviews in order to supply taped protocols. No potential subjects refused interviews. Interviews usually lasted between 15 and 25 minutes.

Answers were recorded in note form on a 2-page Language Experience Questionnaire. They were then summarised on computer database, using a standardised vocabulary for the open-ended responses (see 5.3.2.c for details).

Appendices A5.i, A5.ii and A5.iii show a transcript of a taped interview, a fair copy of the relevant completed Questionnaire, and a printout of the relevant database card.

## 5.3.2 Variables and coding

The database contained three types of field: "Learner-Profile", "Individual-Language", and "GROUP/Keyword", thus generating three categories of variable. Each variable might be said to represent an aspect of learning experience mentioned by the learners. The nature of the variables, however, depends on the category in question; hence they are listed separately below.

### 5.3.2.a Learner-Profile variables

The first, closed-ended interview questions elicited general data about subjects and their language experience, generating the following variables for analysis. The name of each variable is given in *italics*, and its categories are underlined.

## Table 5.3.2/i: Learner-Profile variables

| Name | Ranked[18] categories | Notes |
|------|-----------------------|-------|
| *Total Language Count* | 1 ⇨ 10 | includes naturalistic languages |
| *Class-Only Language Count* | 0 ⇨ 6 | - |
| *Class-Only Maximum Command* | no Class-Only languages ⇨ beginner ⇨ intermediate ⇨ advanced | level of most proficient language (e.g. for a subject with intermediate French and advanced German, advanced will be logged). |
| *Class-Only Exotic Experience* | no Class-Only languages ⇨ Romance/Germanic languages only ⇨ some non-Romance/Germanic experience | lack of cognacy with mother tongue (English)[19] |
| *Solo/Mixed Language Count* | 1 ⇨ 6 | - |
| *Solo/Mixed Maximum Command* | beginner ⇨ intermediate ⇨ advanced | level of most proficient language[20] |
| *Solo/Mixed Exotic Experience* | Romance/Germanic only ⇨ non-Romance/ Germanic experience | - |
| *Solo/Mixed Maximum Country Experience* | none ⇨ holidays ⇨ residence | longest stay in an L2 country (e.g. for a subject who has only had holidays in France, but lived in Germany, residence will be logged) |
| *Solo/Mixed Initial Learning-Means Profile* | all languages classwork-only / parallel ⇨ languages vary ⇨ all languages self-instruction-only | mode(s) at start of learning each language; "parallel" = simultaneous class + self-instruction |
| *Solo/Mixed Dropout Profile* | all languages continuing ⇨ languages vary ⇨ all languages stopped | - |
| *Solo/Mixed Failure Profile* | all languages successful ⇨ languages vary and/or so-so ⇨ all languages failed | - |
| *Sex* | female ⇨ male | - |

---

[18] "Low" ⇨ "high" on the variable in question. Thus a positive correlation between *Sex* and *Total language count*, say, would show that males have more languages overall. Except in the case of count variables, low/high assignation is arbitrary.

[19] The Materials Checklist in Section 3.2 proposes various language difficulty criteria. Preliminary analyses (not given here) indicated that the ±Romance/Germanic division, corresponding to lexical similarity (Checklist Item 1c), was the most fruitful.

[20] A 3-point proficiency scale was felt to be accurate enough for the purpose (Naiman *et al*, 1978: cf. discussion in 2.6.1).

*Sex* is a background rather than a language-experience factor (cf. 5.1.3: Detailed Objectives): it will only be included in the model if it proves to have a clear interaction with the other Learner-Profile variables.

### 5.3.2.b "Individual-Language" variables

Data was also logged for each of a subject's Solo/Mixed languages:

### Table 5.3.2/ii: Individual-Language variables

| Name | Ranked categories | Notes |
|---|---|---|
| *Exoticism* | Romance/Germanic ⇨ non-Romance/Germanic | expresses cognacy to L1 (English) |
| *Command* | beginner ⇨ intermediate ⇨ advanced | - |
| *Country Experience* | none ⇨ holidays ⇨ residence | - |
| *Initial Learning Means* | classwork-only ⇨ parallel ⇨ self-instruction-only | mode at start of learning only |
| *Final Learning Means* | classwork-only ⇨ parallel ⇨ self-instruction-only | mode at abandonment/interview only |
| *Overall Learning Means* | some classwork at all times ⇨ phases vary ⇨ self-instruction-only at all times | mode over whole learning history; some classwork at all times: i.e. at least one "parallel" phase, perhaps also class-only phases; phases vary: some classwork/parallel, some self-instruction only |
| *Dropout* | continuing ⇨ abandoned | - |
| *Failure* | successful ⇨ so-so ⇨ failed | - |
| *Subject* | S01 ⇨ ⇨ S70 | interviewee/protocol label |
| *Language Name* | Chinese ⇨ Swedish | - |
| *L3 Distance* | cognate FL(s) known ⇨ no cognate FLs known | is the language cognate[21] to *any* other language known by the learners? |

---

[21] Cognate = in the same lexical-genetic (sub-)family: links within the Romance, Germanic and Chinese (Putonghua + Cantonese) families occurred in the data. Japanese was included in the Chinese group on the basis of shared script and borrowed lexis.

Most of the 70 interviewees had more than one Solo/Mixed language: 124 language tokens were logged in all. The last three variables in the Table are not included in all analyses:

★ *Subject* was logged merely to check that language tokens were statistically independent from learners. A Discriminant Analysis test (cf. 5.3.4.c) failed to produce any linkage between *Subject* and the other variables: hence there appears to be no barrier to analysing language tokens as independent cases in their own right.

★ *Language Name* is a true categorial variable, containing the 16 different language types logged. This meant that it could not be included in the main set of Factor and Discriminant Analysis tests - except for one Discriminant Analysis test where it is examined as a dependent variable.

★ *L3 Distance* is an attempt to get at L3 (other foreign-language) influences on the language in question. Its content validity, however, is undermined by the fact that, without any indicator of which language preceded which, it is impossible to determine direction of influence: if, for example, a learner has French as a Solo/ Mixed language and Spanish as a Class-Only language, cognate FL(s) known will be logged for French - but if Spanish was learnt *after* French, transfer from Spanish cannot have influenced French. Hence *L3 Distance* is examined merely as a back-up to *Exoticism*, whose content validity is beyond question (mother tongues always precede foreign languages!).

## 5.3.2.c "GROUP/Keyword" variables

The questionnaire had 5 open-ended questions concerning subjects' perceptions of self-tuition, giving 5 "open-ended" fields on the database (cf. example questionnaire and database card in Appendices A5.ii and A5.iii):

**Table 5.3.2/iii: Questionnaire and Database Fields**

| "Helpful" | "Problematic" |
|---|---|
| <a> Helpful materials features<br><br><c> Independent learner strategies<br><d> Other helpful factors | <b> Problematic materials features<br><br><e> Other problematic factors[22] |

When transferring the questionnaire protocols to database, a standardised 1-word : 1-concept vocabulary was used. It has two main levels: "Keywords" and "GROUPs".

Keyword names were supplied by the subjects themselves (e.g. *Writing, Discipline*), and others by the researcher (e.g. *StudyBuddy, Learnability*); they aim to codify the raw experience of the subjects, with as little researcher interpretation as possible. A little standardisation was needed, of course: thus "spelling", "script", "writing system" and "characters", for example, in the interview protocols became "*Script*" in the database. Keywords only mentioned by one subject were dropped. Keywords always bear an initial capital letter.

GROUPs are researcher-defined groupings of Keywords, intended to make the data more manageable - to see the wood for the trees, as it were. For example, if a database field contained the Keywords "*Conversation*", "*Pronunciation*" and/or "*Speaking*", it was also given the GROUP tag "*SPEAKING*". GROUP tags are written in capitals throughout.

The post-hoc, "ethnomethodological" Keyword method is intended to come as close as possible to codifying the interviewees' subjective reality (Levinson, 1983). The higher-order GROUPs, however, being formed by the researcher, risk being merely research artefacts. This risk, however, is tackled head-on by using Factor Analyses (5.3.4.b) to find out the real categories, in learner-experience terms, that underlie the posited groupings.

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[22] The rare problems cited with independent strategy-use were logged here.

For statistical analysis, the five database fields were collapsed into two - Helpful and Problematic (Table 5.3.2/iii above). Each Keyword and GROUPs could then generate two variables:

★ a *Mention* variable: item <u>unmentioned</u> ⇨ <u>mentioned</u>

★ a *Quality* variable: item <u>problematic</u> ⇨ <u>neutral</u> (mixed/unmentioned) ⇨ <u>helpful</u>

To avoid zero:zero correlations (e.g. *Linguaphone* correlating with *PHYSICAL* problems because the same people failed to mention them!), Keywords and GROUPs with fewer than 11 mentions (15%) were logged but not analysed statistically.

Table 5.3.2/iv below lists the Keywords (≥2 mentions) by GROUP. The **stat var?** column records whether the GROUP or Keyword had enough mentions (11 or more[23]) to qualify (✓) as a variable for statistical analysis. The **notes** column adds "operationalising data" used to make coding decisions; where this is lacking, it is because the Keyword's meaning is self-evident (e.g. SelfCorrection), and/or because the Keyword itself was so frequently cited by learners that we seem to be dealing with an established learner concept (e.g. Practice).

**Table 5.3.2/iv: GROUPs and Keywords**

| GROUP | Keywords | stat. var? | notes |
|---|---|---|---|
| *ABANDONMENT* | | ✗ | explicit, unprompted mention of abandonment of learning |
| | *Abandonment* | ✗ | - |
| *ASSESSMENT* | | ✓ | - |
| | *Assessment/Feedback* | ✓ | formative testing and/or information/advice |
| | *Progress* | ✓ | subjective feeling of making headway |
| | *Exam* | ✗ | external summative test |
| | *SelfCorrection* | ✗ | - |

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[23] Mention rates for all GROUPs and Keywords are given in 5.4.4.

## Table 5.3.2/iv (continued)

| GROUP | Keywords | stat. var? | notes |
|---|---|---|---|
| *CLASSWORK* | | ✓ | - |
| | *Class* | ✓ | explicit, unprompted mention of classroom learning |
| | *Peers* | ✗ | - |
| | *Teacher* | ✗ | - |
| *COMPONENTS* | | ✓ | published learning elements, part of self-instruction package[24] or free-standing |
| | *CourseCassette* | ✓ | audiotape |
| | *CourseVideo* | ✓ | - |
| | *CourseBroadcasts* | ✗ | live radio/TV lessons |
| | *Call* | ✗ | computer lessons |
| | *Grammarbook* | ✗ | - |
| | *VocabBook* | ✗ | - |
| *EFFORT/PLANNING* | | ✓ | - |
| | *Discipline* | ✓ | self- ~ or external ~ |
| | *HardWork* | ✓ | - |
| | *Routine* | ✓ | regular work patterns |
| | *Time* | ✓ | ~ for learning |
| | *Gaps* | ✗ | periods of temporary L2 abandonment |
| | *Goal* | ✗ | ~setting |
| | *Maintenance* | ✗ | ~ of existing skills |
| *ENJOYABILITY* | | ✓ | ... of materials[25], etc. |
| | *Enjoyability* | ✓ | ~ in general |
| | *IntrinsicInterest* | ✓ | ~ of texts, etc. |
| | *Variety* | ✓ | - |
| *EXPERTISE* | | ✓ | - |
| | *Aptitude* | ✓ | language ~ |
| | *Experience* | ✗ | ~ of language learning |
| | *Strategies* | ✗ | awareness of strategy-use |
| *GRAMMAR* | | ✓ | - |
| | *Grammar* | ✗ | - |

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[24] "Coursebook" is not logged because of its very ubiquity.

[25] Contrast *MOTIVATORS:LearningPleasure*, which denotes an interest in learning per se.

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## Table 5.3.2/iv (continued)

| GROUP | | Keywords | stat. var? | notes |
|---|---|---|---|---|
| INPUT | | | ✓ | miscellaneous input features |
| | | Authentic/Realistic | ✓ | (good approximation of) real text |
| | | Content/Syllabus | ✓ | target linguistic items and/or their sequencing principle |
| | | Input | ✓ | ~ in general |
| | | Level | ✓ | assumed learner proficiency |
| | | Speed | ✓ | speech-rate of listened text |
| | | Dialogues | ✘ | - |
| | | Examples | ✘ | ~ illustrating linguistic rules |
| | | Storyline | ✘ | - |
| | | TranslatedInput | ✘ | dual-language input text |
| LANDESKUNDE | | | ✘ | cultural background information |
| | | Landeskunde | ✘ | - |
| LANGUAGE-CONTRAST | | | ✓ | |
| | | Learnability | ✓ | intrinsic ease/difficulty of L2 |
| | | Transfer | ✓ | from L1 or L3 |
| LISTENING | | | ✓ | - |
| | | Listening | ✓ | ~ in general |
| | | RecordedText | ✓ | authentic, not part of a course package |
| | | Understanding[26] | ✓ | - |
| | | OnAir | ✘ | live TV/radio |
| METALANGUAGE | | | ✓ | - |
| | | Explanations | ✘ | - |
| | | Metalanguage | ✘ | ~ in general |
| MOTIVATORS | | | ✓ | - |
| | | Confidence | ✓ | self- ~ |
| | | Culture | ✓ | identification with L2 culture, etc.[27] |
| | | LearningPleasure | ✓ | intrinsic (language-) learning pleasure |
| | | Motivation | ✓ | ~ in general |
| | | Need | ✓ | ~ for L2 |
| | | Expectations | ✘ | of progress/proficiency |

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[26] This is the only Keyword that bridges two GROUPs: it may be tagged either as LISTENING or READING.

[27] Contrast LANDESKUNDE, which denotes culture as a syllabus topic.

## Table 5.3.2/iv (continued)

| GROUP | | Keywords | stat. var? | notes |
|---|---|---|---|---|
| *MULTIPLE* | | | ✓ | using a combination of learning means, packages or course components |
| | | *Basis* | ✓ | one means/etc. as a foundation for another |
| | | *Multiple* | ✓ | ~ in general |
| *PEOPLE* | | | ✓ | - |
| | | *Country* | ✓ | ~ where L2 is used |
| | | *Informant* | ✓ | ~ about L2 |
| | | *NativeSpeaker* | ✓ | - |
| | | *StudyBuddy* | ✓ | - |
| | | *ExpatCommunity* | ✗ | L2 community in Britain |
| *PACING* | | | ✓ | ~ of syllabus[28] |
| | | *Gradient* | ✓ | presentation rate of new target content |
| | | *Length* | ✗ | ~ of units or of course as a whole |
| | | *Pace* | ✗ | rate of going through exercises/units |
| *PHYSICAL*[29] | | | ✗ | age, illness |
| *PRACTICE* | | | ✓ | output practice features |
| | | *Controlled* | ✓ | - |
| | | *Translation* | ✓ | - |
| | | *Personalized* | ✗ | - |
| | | *Practice* | ✗ | ~ in general |
| | | *RealOutput* | ✗ | message-based, real(istic) communication |
| *PUBLISHERS* | | | ✓ | ~ or series titles |
| | | *Bbc* | ✓ | - |
| | | *Colloquial* | ✗ | - |
| | | *Hugo* | ✗ | - |
| | | *Linguaphone* | ✗ | - |
| | | *TeachYourself* | ✗ | - |
| *READING* | | | ✓ | - |
| | | *Reading* | ✓ | ~ in general |
| | | *Understanding*[30] | ✓ | - |

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[28] Contrast INPUT:Speed, which denotes the words-per-minute speed of a listening text.

[29] Contained single-mention "Keywords" only.

[30] This is the only Keyword that bridges two GROUPs: it may be tagged either as LISTENING or READING.

## Table 5.3.2/iv (continued)

| GROUP | Keywords | stat. var? | notes |
|---|---|---|---|
| *SPEAKING* | | ✓ | - |
| | *Conversation* | ✓ | interactive talk with real interlocutor |
| | *Pronunciation* | ✓ | - |
| | *Speaking* | ✓ | ~ in general |
| *STRATEGIES* | | ✓ | - |
| | *Dictionary* | ✓ | - |
| | *Inductive* | ✓ | discovery learning encouraged by materials or learning mode |
| | *Memorisation* | ✓ | - |
| | *Notetaking* | ✓ | - |
| | *Repetition* | ✓ | ~ of target items/text |
| | *Revision* | ✓ | ~ after further progress through the course |
| | *KeywordImagery* | ✗ | ~ and mnemonics |
| | *Deductive* | ✗ | explanation ⇨ assembly |
| | *Etymology* | ✗ | L2-internal ~ |
| | *RepeatedTask* | ✗ | using input text/practice activity several times |
| | *Teaching* | ✗ | ~ L2 to others |
| | *ThinkingInL2* | ✗ | - |
| *TECHNOLOGY* | | ✓ | - |
| | *LanguageLab* | ✓ | - |
| | *Players* | ✗ | walkmen, cassette/video players |
| *USABILITY* | | ✓ | - |
| | *Clarity/Structure* | ✓ | clarity, ease of use, well-structuredness |
| | *Usability* | ✓ | ~ in general |
| | *Expense* | ✗ | - |
| | *Legibility* | ✗ | includes radio/TV reception |
| | *Obtainability* | ✗ | - |
| | *ReferenceValue* | ✗ | - |
| *VOCABULARY* | | ✓ | - |
| | *Style* | ✓ | - |
| | *Vocabulary* | ✓ | ~ in general |
| *WRITING* | | ✓ | - |
| | *Writing* | ✓ | ~ in general |
| | *Script* | ✗ | spelling and character systems |

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## 5.3.3 Reliability

### 5.3.3.a. Note-taking

Interviewing by telephone meant that, for technical (and probably legal) reasons, the conversations could not be taped. In order to check whether the written protocols were a reliable summary of the subjects' actual responses, two volunteer Users were interviewed face to face and the conversations recorded; one conversation was transcribed (Appendix A5.i). A week later (to avoid memory effects), the open-ended sections of the interview protocols were compared against the cassette recordings, and Keyword types per database field were counted.

The two recordings revealed a few Keywords (4 from a grand total of 98) missing from the written notes, but none oversupplied in the notes. This 4% information loss appears small enough not to invalidate the note-taking method. Against this one must set the advantages of telephone interviewing in terms of random sampling and accessibility, and the fact that simultaneous note-taking is highly time-efficient.

### 5.3.3.b Database coding

The complexity of the GROUP/Keyword taxonomy meant that it was not feasible to find a second coder with both the subject expertise and the time available for training. However, it also meant that reliable coding was vital. Hence I opted for intra-rater reliability checks (Scholfield, 1995). With 7 subjects, I repeated the GROUP/ Keyword coding of protocol data (9 to 10 weeks after the first coding run, in order to avoid memory effects):

**Table 5.3.3/i: Coding of open-ended variables: reliability scores (7 subjects)**

| Variable | Mean number of types per database field, identified ... | | |
|---|---|---|---|
| | ... on both coding runs | ... on 1st run only or on 2nd run only | ... overall |
| Keywords | 2.69 (76%) | 0.83 (24%) | 3.51 (100%) |
| GROUPs | 2.34 (83%) | 0.49 (17%) | 2.83 (100%) |

Whereas the percentages of items identified on both coding runs do not appear so low as to invalidate the coding procedure per se, data from a single coding run does seem unreliable. Therefore it was decided to second-code all 70 protocols, only accepting the Keyword and GROUP tags identified on both runs.

## 5.3.4 Statistical analysis

### 5.3.4.a Introduction: multivariate methods

Because of the great number of variables in the main study, multivariate statistical methods (e.g. Nie *et al* 1975; Norušiš 1985) were used to identify the patterns they form: as Regan points out (1994), multivariate methods are the ideal tools for exploring wide-ranging, diffuse and exploratory datasets. Bivariate tests (e.g. chi-square) are used only rarely, to focus in on certain key questions.

As multivariate analyses are fairly complex, I shall describe the two tests used, and conclude with a discussion of other statistical issues.

### 5.3.4.b Factor analysis

The Table below (Table 5.3.4/i) shows an example Factor Analysis (cf. Table 5.4.2/i):

**Table 5.3.4/i**

**Example Factor Analysis**

**Variables: Learner-Profile**

| | A. Sampling adequacy | | | .58 |
|---|---|---|---|---|
| **B. Percentage of Dataset Variance Accounted For** | | | | |
| | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
| Per Factor | 31.3% | 18.9% | 15.4% | 9.8% |
| Cumulative | 31.3% | 50.3% | 65.7% | 75.5% |
| **C. Variable:Rotated-Factor Correlation Matrix (correlations >.40 only)** | | | | |
| | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
| *Class-Only Exotic Experience* | .93 | - | - | - |
| *Class-Only Language Count* | .89 | - | - | - |
| *Class-Only Maximum Command* | .87 | - | - | - |
| *Total Language Count* | .55 | .70 | - | - |
| *Solo/Mixed Language Count* | - | .91 | - | - |
| *Solo/Mixed Exotic Experience* | - | .79 | - | - |
| *Solo/Mixed Initial Learning-Means Profile* | - | - | .80 | - |
| *Solo/Mixed Failure Profile* | - | - | .70 | - |
| *Solo/Mixed Maximum Command* | - | - | -.67 | .49 |
| *Solo/Mixed Dropout Profile* | - | - | .62 | - |
| *Solo/Mixed Maximum Country Experience* | - | - | - | .88 |
| **D. Suggested Names** | | | | |
| | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
| | Class-Only Languages | Self-Instructed Experience | Learning-Means Effects | Environment Effects |

A Factor Analysis is similar to a correlation test, but with more than two variables. In Factor Analysis, variables are clustered together to form a smaller number of super-variables, or "Factors". Each Factor is made up of a number of variables which correlate as well as possible together, but which have as little correlation as possible with variables from other Factors (this involves a process of repeated computer passes, or "rotation", until the best fit is reached).

The improvement of the Factor Analysis over the original variables is shown by the "sampling adequacy" (line A in the Table). If less than .50, the Factor Analysis should be rejected; .58, as here, is acceptable, though not excellent.

The relative strength of each Factor is shown by the **percentage of data-set variance it** accounts for (B). There is always some residual variance unexplained by the Factors (the final **cumulative percentage** cell only totals 75.5%).

The **correlation matrix** (C) shows the relative contribution of each variable to each Factor in terms of its correlation to the Factor (for clarity's sake, only correlations of .40 and above are reported, and correlations of above .50 are highlighted[31]). Here, for example, Factor 1 is made up, in order of strength, by *Class-Only Exotic Experience*, *Class-Only Language Count*, *Class-Only Maximum Command*, and *Total Language Count*. The last-named contributes to Factors 1 and 2. **Opposite polarities within a** Factor (e.g. in Factor 3: *Solo/Mixed Maximum Command* -.67, *Solo/Mixed Dropout Profile* +.62) show that, as one variable goes up, the other goes down - thus *Command* falls as *Dropout* rises, and vice versa.

Finally, **names** (D) are given to the Factors given on the basis of their main contributor variables.

### 5.3.4.c Discriminant analysis

As an example of this technique, let us look at Table & Graph 5.3.4/ii below (a copy of Table & Graph 5.4.5/ii):

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[31] See notes on correlations in 5.3.4.d below.

**Table 5.3.4/ii: Example Discriminant Analysis;**

**Dependent Variable: *Class-Only Exotic Experience*;**

**Independents:Keyword *Mention* and *Quality***

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 59.88% | 40.12% |
| A2. Canonical correlation | .65 | .58 |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Using videos, hard learning | Writing, not memorisation & time |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *(COMPONENTS:)*[32] *CourseVideo Mention* | .93 | .09 |
| *(LANG.-CONTRAST:) Learnability Quality* | -.72 | -.33 |
| *(WRITING:) Writing Mention* | .10 | .83 |
| *(STRATEGIES:) Memorisation Mention* | .49 | -.61 |
| *(EFFORT/PLANNING:) Time Mention* | -.36 | -.47 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| *(MULTIPLE:) Basis Mention* | .49 | - |
| *(COMPONENTS:) CourseVideo Mention* | .48 | - |
| *(EFFORT/PLANNING:) HardWork Quality* | -.40 | - |
| *(WRITING:) Writing Mention* | - | .64 |
| *(WRITING:) Writing Quality* | - | .54 |
| *(STRATEGIES:) Memorisation Mention* | .46 | -.47 |

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[32] For reference purposes, the GROUP tag is given before each Keyword in the Tables.

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**Graph 5.3.4/ii:** *Class-Only Exotic Experience* **(Keyword Functions)**
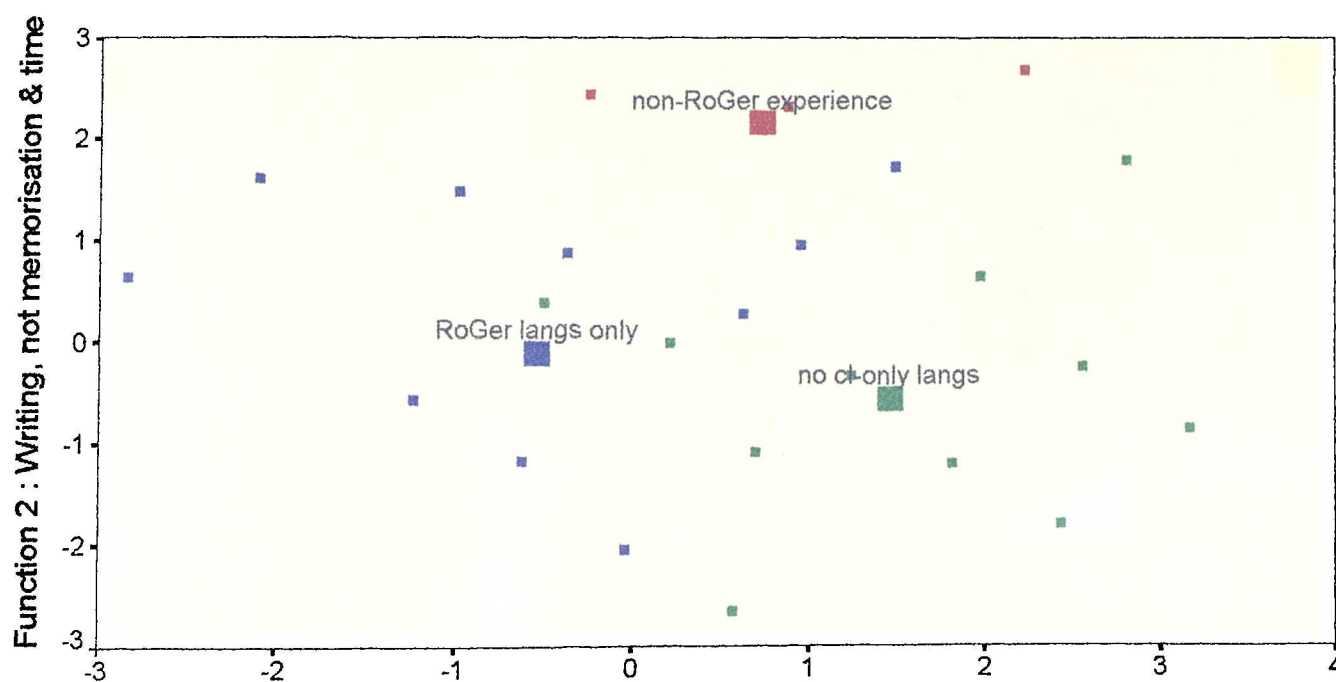


Function 1 : Using videos, hard learning

large squares = means, small squares = individual cases

Discriminant Analysis takes a single **"dependent"** variable (here: *Class-Only Exotic Experience*) and sees what links it has with the other (**"independent"**) variables. The dependent variable must be **categorial**, i.e. consisting of discrete categories (here these are no class-only languages, Romance/Germanic only, and non · Romance/Germanic experience), rather than numeric (i.e. arranged along a pure number scale, as e.g. height or weight). The independents, however, must be either numeric, or - as with all the tests here - at least **scalar**, i.e. having their categories arranged along a single scale with roughly equal distance between them (e.g. beginner ⇨ intermediate ⇨ advanced proficiency).

The computer program makes several passes through the list of independent variables, until it has found the combination(s) of independents that best predict(s) the dependent. Each combination is known as a **"(Canonical Discriminant) Function"**, and the strength of the prediction is shown by the **"canonical correlation"** (Table Section A2

above)[33]. A strong canonical correlation means not only a strong linkage between the dependent and the independents chosen for the Function, but also that the dependent's categories are very distinct: hence the name Discriminant Analysis.

For a dependent variable with 2 categories (e.g. *Gender*), one Function is enough. With 3 or more categories, 2 or more Functions may be needed, because adding an extra category adds the possibility of an extra dimension: e.g. men, women and children can be distinguished along the dimensions (i.e. Functions) of age (children ⇨ men & women) and gender (women ⇨ children ⇨ men). This is the case in the example. The relative strength of two or more Functions is shown by their relative canonical correlations, and also by the **percentage of dataset variance** they explain (A1): the latter should total 100%.

What do the Functions mean? This can be found firstly by analysing their make-up. The **Coefficient Matrix** (B2) lists the independent variables chosen by the program to give the maximum canonical correlations. The figures are "**coefficients**", expressing the relative contribution of each variable to each Function. Some relate more strongly to Function 1 (shown by highlighted figures in Function 1's column), and some more to Function 2 (highlighted under Function 2). Function 1, therefore, consists mainly of high *Mentions* of *CourseVideo* (positive coefficient: .93), plus a slightly lesser contribution from poor *Quality Learnability* experiences (negative coefficient: -.72). Though *Writing, Memorisation* and *Time* do have a small effect on Function 1 (lowish coefficients of .10, .49 and -.36 respectively), they have stronger coefficients on Function 2 (.83, -.61 and -.47), so they are seen as "belonging" to Function 2. Like Function 1, Function 2 is named on the basis of its variables and their polarity: "Writing, not memorisation & time".

This is the key information. However, the fact that the computer selected the best possible combination of independent variables to predict *Class-Only Exotic Experience* does not mean that all the other independents are unrelated to *Class-Only Exotic*

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[33] The Function can be tested for statistical significance by a chi-square test. The fact that I reject any Functions with a canonical correlation below .40 means all Functions I accept are highly significant (with one non-significant exception).

*Experience.* The **Correlation Matrix** shows all variables that have a meaningful correlation (.40 and over[34]) with the Function (highlighting shows which of the two Functions correlates more strongly with each variable). Thus:

★ a variable with a strong coefficient and a strong correlation (e.g. *Writing Mention* on Function 2: coefficient .83, correlation .64) will be a powerful predictor of the dependent variable (thus heredity is a powerful predictor of childhood allergic asthma).

★ a variable appearing in the Coefficient Matrix but not in the Correlation Matrix (e.g. *Time Mention* on Function 2) has a key add-on effect to the Function, but in isolation does not predict the dependent (thus high exposure to cats *per se* might be a poor predictor of childhood asthma, but if we add cats to heredity we might get a better prediction than with heredity alone).

★ a variable not appearing in the Coefficient Matrix but appearing in the Correlation Matrix (e.g. *Writing Quality*) is a good predictor of the dependent variable - but not as good as the combination in the Coefficient Matrix, and is not worth adding to the Coefficient Matrix (thus high exposure to house-dust *per se* might be a good predictor of asthma, but the combination of cats and heredity might be better; and asking about exposure to house-dust wouldn't enable us to predict asthma any better than by only asking about cats and heredity).

The information for each Function is combined to give each one a **name**. Thus "Using videos, hard learning" combines the influence of *CourseVideo Mention* with *Learnability* and *HardWork Quality* for Function 1, and ...

Who then, has "Using videos, hard learning", and who tends to mention "Writing, not memorisation & time"? This is shown in the **Graph**. All the subjects are given a **"Function score"** for each Function, depending on the *Mention/Quality* rating they give to its Key Variables. These individual scores (small squares[35]), together with the

[34] See 5.3.4.d for details.

[35] A small square may denote one or several subjects with the same score(s) - this is why virtually no graph has 70 small squares.

mean scores for each category of subjects (large squares + category labels), can then be plotted along a Graph with Function 1 as the horizontal axis, and Function 2 as the vertical axis[36].

To look at our example, Romance/Germanic only learners (blue) have low scores on Function 1 and lowish scores on Function 2. From Function 1's name, this means they mention *CourseVideos* less, and/or have good *Learnability* experiences; from Function 2, this also means they mention *Writing* less and *Memorisation* and/or *Time* more. Those with Class-Only non-Romance/Germanic experience (red) have high scores on Function 2: this means more *Mention* of *Writing*, but less of *Memorisation* and/or *Time*. Function 1 has little to say here, however, as the category has neutral scores on the Function. Those with no Class-Only languages (green) have high scores on Function 1 and low scores on Function 2, which means they mention *CourseVideo*, *Memorisation*, *Basis* and/or *Time* more, *Writing* relatively little, and have *HardWork* and/or *Learnability* problems.

### 5.3.4.d Methodological notes

All raw variables are initially **standardised** to z-scores (mean 0, standard deviation 1) in order to give them equal weight in the analyses.

The two tests make extensive use of **correlation** figures. Pilot analyses showed that only correlations of .50 and above can be relied on to give coherent indications, and that correlations of below .40 merely confuse the picture, and are best disregarded. These values are more conservative than those used in many linguistic studies, but they accord with recommendations in the statistical literature - after all, if two variables show a correlation of .40, this means that one is only responsible for 16% (.40 squared) of variance in the other.

The tests described demand that independent **variables** be, if not numeric, then binary or scalar in nature. With a number of variables - e.g. *Command* (beginner ⇨ interme-

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[36] If only one Function is generated, the Graph has no vertical axis.

diate ⇨ advanced) - the assumption of a steady linear progression from one end of the scale to another seems safe. With others, however, it seems less so. Three Learner-Profile variables (e.g. *Solo/Mixed Dropout Profile*), for example, have languages vary as their middle category, which implies an extra language-count dimension (one language cannot vary!).

When a variable is used as a dependent in Discriminant Analyses, this is no problem: indeed, the test will reveal the exact relationship between the variable's categories. Problems might come, however, when variables that turn out to be non-linear are used as independents in other tests. But with 3-category variables, non-linearity (e.g. a language-count dimension being stronger than dropout per se) will not so much warp the variable as "randomise" it (if the middle languages vary category is the key one, there will not be much difference between the two end categories all languages continuing and all languages stopped, so the variable will not carry much clout). This is not necessarily true for 4-category variables, but the only 4-category variables used here proved to be fully linear.

# 5.4 Results

After checking whether *Sex* is an operative variable in the dataset (Section 5.4.1), Factor Analyses and raw data will be presented for the Learner-Profile and Individual-Language variables (5.4.2 and 5.4.3 respectively). Then a GROUP/Keyword Factor Analysis and raw data will follow (5.4.4), including qualitative excerpts from the GROUP/Keyword protocols. Finally, Section 5.4.5 will examine cross-links between Learner-Profile data and the open-ended GROUP/Keyword reports.

## 5.4.1 Gender effects

As stated in 5.1.3, *Sex* is the only potential background variable to be screened for; age and mother tongue/culture are control variables, and a rough profile is given of the population's social/professional characteristics in 5.2.3.

**Table 5.4.1/i: *Sex***

| Categories | No. of subjects |
|---|---|
| female | 39 |
| male | 31 |
| total | 70 |
| Goodness-of-Fit test | |

| Chi$^2$ | df | p |
|---|---|---|
| 0.91 | 1 | .34 |

Table 5.4.1/i shows that there are slightly more women than men in the sample, but the difference is not significant (p .34). An attempted Discriminant Analysis of *Sex* against the other Learner-Profile variables failed outright: in other words, gender differences appear to have no reflection in learner achievement. Though Discriminant Analyses

using GROUP/Keyword variables as independent variables[37] did indicate learner-strategy differences, these did not fit into a generalisable pattern, and therefore will not be analysed here.

Gender, therefore, does not appear to be an operative variable, at least in achievement (Learner-Profile) terms, and will be dropped from the model, enabling the analysis to focus on learning processes, strategies and achievements.

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[37] See Appendix A5/iv for Tables.

## 5.4.2 Learner-Profile variables

### 5.4.2.a Factor Analysis

A Factor Analysis (Table 5.4.2/i) of the Learner-Profile Variables was successful. Sampling adequacy was reasonable (.58), showing that the 4 Rotated Factors generated are indeed an improvement on the original variables:

**Table 5.4.2/i**

**Learner-Profile Variables: Factor Analysis**

| | | A. Sampling adequacy | | .58 |
|---|---|---|---|---|
| **B. Percentage of Dataset Variance Accounted For** | | | | |
| | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
| Per Factor | 31.3% | 18.9% | 15.4% | 9.8% |
| Cumulative | 31.3% | 50.3% | 65.7% | 75.5% |
| **C. Variable:Rotated-Factor Correlation Matrix (correlations >.40 only)** | | | | |
| | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
| Class-Only Exotic Experience | .93 | | | |
| Class-Only Language Count | .89 | | | |
| Class-Only Maximum Command | .87 | | | |
| Total Language Count | .55 | .70 | | |
| Solo/Mixed Language Count | | .91 | | |
| Solo/Mixed Exotic Experience | | .79 | | |
| Solo/Mixed Initial Learning-Means Profile | | | .80 | |
| Solo/Mixed Failure Profile | | | .70 | |
| Solo/Mixed Maximum Command | | | -.67 | .49 |
| Solo/Mixed Dropout Profile | | | .62 | |
| Solo/Mixed Maximum Country Experience | | | | .88 |
| **D. Suggested Names** | | | | |
| | Factor 1 | Factor 2 | Factor 3 | Factor 4 |
| | Class-Only Languages | Self-Instructed Experience | Learning-Means Effects | Environment Effects |

**Factor 1** is made up of the three class-only variables (see correlation matrix): hence its suggested name of "Class-Only Languages". *Total Language Count* is also involved, albeit less strongly (.55 correlation), by dint of its link with *Class-Only Language Count*.

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The fact that this Factor takes the lion's share (31.3%) of variance may well be an artefact of coding: the fact that the subjects in the no class-only languages category are the same across the three *Class-Only* variables (cf. Table 5.3.2/i) is bound to increase the variables' inter-correlation. To examine this, the Factor Analysis was re-run excluding the 15 no class-only languages subjects[38]. The order of the Factors changed a little, pushing "Class-Only Languages" into second position: thus the non-independence caused by the category in question had increased the Class-Only variables' inter-correlation somewhat. On the other hand, the internal composition of each Factor remained virtually the same: thus any tendencies towards non-independence and non-linearity had little warping effect on the data. Therefore it was judged safe to retain all 70 subjects for further analyses, though no further account was taken of the rank ordering of the Factors.

**Factor 2** shows positive correlations between *Solo/Mixed Language Count* and *Solo/Mixed Exotic Experience* (unsurprisingly, as one's experience of a non-Romance/ Germanic language is more probable with higher language counts): hence its name of **"Self-Instructed Experience"**. As might be expected, *Total Language Count* is involved here too, by dint of its link with *Solo/Mixed Language Count*. Interesting by its absence, however - in contrast with Factor 1 - is *Solo/Mixed Maximum Command*.

This variable is involved in **Factor 3**, where its companions show that maximum command in a Solo/Mixed language is strongly related to learning mode: hence the Factor's title, **"Learning-Means Effects"**. A tendency towards starting learning with self-instruction-only (high scores on *Initial Learning-Means Profile* correlate positively with the function: .80) is linked to low *Maximum Command* (negative correlation: -.67), and high *Dropout* and *Failure* rates (positive correlations: .62 and .70 respectively). Conversely, of course, high maximum command is linked to preference for classwork, success, and a tendency to be still learning all one's Solo/Mixed languages.

**Factor 4** - **"Environment effects"** - shows the other influence on *Solo/Mixed Maximum Command*: longer *Maximum Country Experience*.

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[38] See Appendix A5.v for data table.

There is no Factor where both Class-Only and Solo/Mixed variables are present: in other words, there appears to be little linkage between the two learning-means groupings.

Raw data for the individual variables in each Factor will now be given, together with summary results of Discriminant Analysis tests comparing each variable with its fellow Learner-Profile variables. As the latter tests serve only to back up or refine the Factor Analysis findings, it was felt that presenting the data in full would be unnecessarily complex; the relevant Discriminant Analysis tables, however, can be found in the Appendices.

## 5.4.2.b Factor 1: Class-Only Languages

The main variables here were, in order of correlation strength: *Class-Only Exotic Experience*, *Class-Only Language Count*, *Class-Only Maximum Command*, and *Total Language Count*.

### 5.4.2.b.i *Class-Only Exotic Experience*

Table 5.4.2/ii shows raw data for this variable:

Table 5.4.2/ii

*Class-Only Exotic Experience*: Raw Data

| Categories | No. of subjects |
|---|---|
| no Class-Only languages | 15 |
| Romance/Germanic only | 49 |
| non-Romance/Germanic experience | 6 |
| Total | 70 |

A Discriminant Analysis test[39] comparing *Class-Only Exotic Experience* against the Solo/Mixed Learner-Profile variables confirmed the Factor Analysis findings: *Class-Only Exotic Experience* has no meaningful link to any Solo/Mixed variables.

5.4.2.b.ii *Class-Only Language Count*

Raw data for this variable is shown in the Table below:

Table 5.4.2/iii

*Class-Only Language Count*: Raw Data

| Language tokens per subject | No. of subjects |
|---|---|
| 0 | 15 |
| 1 | 28 |
| 2 | 20 |
| 3 | 4 |
| 4 | 2 |
| 6 | 1 |
| Summary Data | |
| Total subjects | 70 |
| Total language tokens | 94 |
| Mean tokens/subject | 1.34 |

Most subjects have 1 or 2 Class-Only languages, it appears, though a substantial number (15) have none - in other words, all their languages are Solo/Mixed. For further analysis, the categories were merged to three: 0, 1 and 2+ languages.

An attempted Discriminant Analysis comparing *Class-Only Language Count* against the Solo/Mixed Learner-Profile variables failed outright: in other words, it is not an operative variable in self-instructed experience.

5.4.2.b.iii *Class-Only Maximum Command.*

Table 5.4.2/iv shows the raw data for this variable:

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[39] See Appendix A5.vi for data table.

### Table 5.4.2/iv

### *Class-Only Maximum Command*: Raw Data

| Category | No. of subjects |
|---|---|
| no Class-Only languages | 15 |
| beginner | 19 |
| intermediate | 30 |
| advanced | 6 |
| Total | 70 |

It appears that relatively few learners reach advanced level by Class-Only means.

A Discriminant Analysis test comparing *Class-Only Maximum Command* against the Solo/Mixed Learner-Profile variables showed no real link with self-instruction experience[40].

### 5.4.2.b.iv *Total Language Count*

Table 5.4.2/v shows the raw data for this variable:

### Table 5.4.2/v

### *Total Language Count*: Raw Data

| Language tokens per subject | No. of subjects |
|---|---|
| 1 | 7 |
| 2 | 20 |
| 3 | 14 |
| 4 | 16 |
| 5 | 6 |
| 6 | 4 |
| 7 | 2 |
| 10 | 1 |
| Summary Data | |
| Total subjects | 70 |
| Total language tokens | 231 |
| Mean tokens per subject | 3.3 |

---

[40] See Appendix A5.vii for data table.

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Most learners, it seems, have between 2 and 4 foreign languages. In all further tests, the categories had to be collapsed to three (1, 2, and 3+ languages) in order to avoid disruption by group-composition effects: in other words, an increase in *Total Language Count* beyond 3 languages appears to have no consistent influence on language-learning achievement or process.

A Discriminant Analysis test[41] confirmed the unsurprising Factor-Analysis linkage of *Total Language Count* to both *Class-Only* and *Solo/Mixed* variables.

### 5.4.2.c Factor 2: Self-Instructed Experience

The variables forming this Factor are, in order of correlation strength, *Solo/Mixed Language Count*, *Solo/Mixed Exotic Experience*, and *Total Language Count*. *Total Language Count* has already been looked at in the previous sub-section.

*5.4.2.c.i Solo/Mixed Language Count*

Raw data is shown below:

Table 5.4.2/vi

*Solo/Mixed Language Count*: Raw Data

| Language tokens per subject | No. of subjects |
|---|---|
| 1 | 38 |
| 2 | 20 |
| 3 | 5 |
| 4 | 5 |
| 5 | 1 |
| 6 | 1 |
| Summary Data | |
| Total subjects | 70 |
| Total language tokens | 124 |
| Mean tokens per subject | 1.77 |

---

[41] See Appendix A5.viii for data table.

Though interviewees have up to 6 Solo/Mixed languages, counts of 1 or 2 are by far the most typical (mean 1.77, mode 1). Counts of 3 and above were therefore conflated for further analysis. A Discriminant Analysis test[42] comparing *Solo/Mixed Language Count* against the other Learner-Profile Variables:

- confirmed the Factor-Analysis link to *Solo/Mixed Exotic Experience*;

- revealed an unsurprising link with *Solo/Mixed Maximum Command* (the more languages one has, the more the chance of an advanced one);

- revealed a link between higher language-count and a preference for self-instruction as *Initial Learning Means* amongst a certain "language-enthusiast" sub-group of learners;

- revealed a weak correlation with *Class-Only Language Count*.

5.4.2.c.ii *Solo/Mixed Exotic Experience*

Raw data is shown below:

Table 5.4.2/vii

*Solo/Mixed Exotic Experience*: Raw Data

| Categories | No. of subjects |
|---|---|
| Romance/Germanic only | 56 |
| non-Romance/Germanic experience | 14 |
| Total | 70 |

A Discriminant Analysis test[43] comparing *Solo/Mixed Exotic Experience* with the other Learner-Profile Variables confirmed the Factor-Analysis link with *Solo/Mixed Language Count*, though it also identified a certain cross-link between *Solo/Mixed* and *Class-Only Exotic Experience*.

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[42] See Appendix A5.ix for data table.

[43] See Appendix A5.x for data table.

**5.4.2.d Factor 3: Learning-Means Effects**

The variables (all *Solo/Mixed*) forming this Factor are, in order of correlation strength, *Initial Learning-Means Profile*, *Failure Profile*, *Maximum Command* and *Dropout Profile*.

*5.4.2.d.i Solo/Mixed Initial Learning-Means Profile*

In order to cut down on excess data, only the *Initial* phase of the *Learning-Means Profile* was examined at Learner-Profile level. At Individual-Language level, however, *Initial*, *Final* and *Overall Learning Means* turn out to show tight inter-correlation (see Section 5.4.3.a). Hence it is likely that, at Learner-Profile level, the *Initial* data gives adequate information. Table 5.4.2/viii shows raw data for this variable:

**Table 5.4.2/viii**

*Solo/Mixed Initial Learning-Means Profile*: **Raw Data**

| Categories | No. of subjects |
|---|---|
| all languages have classwork strand | 34 |
| languages vary | 18 |
| all languages self-instruction-only | 18 |
| Total | 70 |

The Table shows that a fair number of learners (36: languages vary + all languages self-instruction-only) have experience of ab initio self-instruction in at least some of their languages.

A Discriminant Analysis test[44] against the other Learner-Profile variables confirmed the link between preference for ab initio self-instruction and low *Command*.

---

[44] See Appendix A5.xi for data table.

5.4.2.d.ii *Solo/Mixed Failure Profile*

Raw data is given in Table 5.4.2/ix.

### Table 5.4.2/ix

*Solo/Mixed Failure Profile*: **Raw Data**

| Categories | No. of subjects |
|---|---|
| all languages successful | 45 |
| languages vary/so-so | 17 |
| all languages failed | 8 |
| Total | 70 |

It will be noted that the all-fail tally is quite small (8/70). This is possibly a sampling artefact: self-instructed learners with a sense of across-the board failure are presumably less likely to register as self-access centre users.

A Discriminant Analysis[45] comparing *Solo/Mixed Failure Profile* against the other Learner-Profile variables showed only a weak link with *Solo/Mixed Maximum Command*.

5.4.2.d.iii *Solo/Mixed Maximum Command*

Raw data is given in Table 5.4.2/x:

### Table 5.4.2/x

*Solo/Mixed Maximum Command*: **Raw Data**

| Category | No. of subjects |
|---|---|
| beginner | 15 |
| intermediate | 33 |
| advanced | 22 |
| Total | 70 |

---

[45] See Appendix A5.xii for data table.

A Discriminant Analysis test[46] comparing *Solo/Mixed Maximum Command* against the other Learner-Profile variables linked high command to high *Total Language Count*, domination of classwork on *Initial Learning-Means Profile*, and a sense of overall success (low *Failure-Profile* values).

5.4.2.d.iv *Solo/Mixed Dropout Profile*

Raw data is shown in Table 5.4.2/xi:

### Table 5.4.2/xi

### *Solo/Mixed Dropout Profile*: Raw Data

| Category | No. of subjects |
|---|---|
| all languages continuing | 32 |
| languages vary | 20 |
| all languages stopped | 18 |
| Total | 70 |

In a Discriminant Analysis comparing *Solo/Mixed Dropout Profile* with the other Learner-Profile variables[47], dropout per se did not generate a Function above the .40 correlation threshold. In other words, though *Dropout*'s best fit is with the other Factor 3 variables, it appears to be of little importance in isolation. The fact that *Dropout* is not a strong feature at learner level, however, does not rule out the fact that it may be important at Individual-Language level (see 5.4.3.b.iv below).

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[46] See Appendix A5.xiii for data table.

[47] See Appendix A5.xiv for data table.

### 5.4.2.e Factor 4: Environment Effects

The main variables forming this Factor are, in order of correlation strength, *Solo/Mixed Maximum Country Experience* and *Solo/Mixed Maximum Command*. The latter has already been discussed in 5.4.2.d.iii.

#### 5.4.2.e.i *Solo/Mixed Maximum Country Experience*

This expresses the maximum length of time spent in a native-speaker setting for a Solo/Mixed language:

### Table 5.4.2/xii

### *Solo/Mixed Maximum Country Experience*: Raw Data

| Category | No. of subjects |
|----------|-----------------|
| none | 8 |
| holidays | 32 |
| residence | 30 |
| total | 70 |

Most subjects (62/70), it appears, have at least some native-country experience.

In a Discriminant Analysis comparing *Solo/Mixed Maximum Country Experience* against the other Learner-Profile variables, the results generated were too weak for consideration[48]. As with *Dropout*, however, the fact that *Country Experience* is not a meaningful feature at learner level does not rule out the fact that it may be important at Individual-Language level (see 5.4.3.c.i below).

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[48] I.e. the only Discriminant Function generated was below the .40 canonical correlation threshold.

**5.4.2.f  Summary of Learner-Profile Findings**

There are few cross-links between Class-Only languages on the one hand and Solo/Mixed languages on the other, and those that exist are weak.

Self-instruction does not appear to be an effective learning means, at least in isolation and in the early stages of learning. There are strong links between a preference for ab initio self-instruction and tendencies towards low command, high dropout and sense of failure - though the latter two are much more weakly implicated. On the other hand, there appears to be a sub-group of "language enthusiasts" who show a link between preference for self-instruction and higher language counts.

Maximum length of L2 country stay is also linked to maximum Solo/Mixed command, but its effect is much weaker than that of learning means.

## 5.4.3 Individual-Language variables

The Individual-Language variables look not at the 70 interviewees, but at their 124 Solo/Mixed languages - i.e. excluding Class-Only languages. With many comparisons at Learner-Profile level, it was unclear whether data on, say, *Maximum Command* vs. *Maximum Country Experience* describes the same or different languages by the learner. This risks the under-detection of real links, which the present level of analysis should reveal. In addition, it should indicate whether the more "subjective" variables, such as *Failure*, depend more on the learner or on the specific language experience.

### 5.4.3.a Factor Analysis

Table 5.4.3/i shows the results of a Factor Analysis into the Individual-Language variables:

### Table 5.4.3/i

### Individual-Language variables: Factor Analysis

| | A. Sampling adequacy | | .60 |
|---|---|---|---|
| **B. Percentage of Dataset Variance Accounted For** | | | |
| | Factor 1 | Factor 2 | Factor 3 |
| Per Factor | 37.2% | 17.0% | 13.0% |
| Cumulative | 37.2% | 54.2% | 67.1% |
| **C. Variable:Rotated-Factor Correlation Matrix (correlations >.40 only)** | | | |
| | Factor 1 | Factor 2 | Factor 3 |
| *Overall Learning Means* | .87 | - | - |
| *Initial Learning Means* | .76 | - | - |
| *Dropout* | .72 | - | - |
| *Command* | -.64 | .57 | - |
| *Final Learning Means* | .60 | - | -.61 |
| *Failure* | .40 | - | - |
| *Country Experience* | - | .93 | - |
| *Exoticism* | - | - | .81 |
| **Suggested Names** | | | |
| | Factor 1 | Factor 2 | Factor 3 |
| | Means and Achievement | Environment Effects | Language-Family and Learning-Means |

Sampling adequacy was healthy (.60), and 3 Rotated Factors were produced.

**Factor 1** was named "**Means and Achievement**". It shows a strong inter-correlation amongst the three *Learning Means* variables. In addition, increasing levels of self-instruction rather than classwork (positive *Learning Means* correlations), low *Command* (negative correlation: -.64) and high *Dropout* (positive correlation: .72) are all inter-linked. There is also a slight correlation with *Failure* (.40).

**Factor 2** - "**Environment Effects**" - is similar to Factor 4 in the Learner-Profile analysis: it combines increased *Country Experience* with increased *Command* (positive correlations).

**Factor 3** I called "**Language-Family and Learning-Means**". It links non-Romance/ Germanic languages (*Exoticism*: positive correlation) with a tendency to use classwork as *Final Learning Means* (negative correlation); self-instruction as top-up, by contrast, appears more popular with Romance/Germanic languages.

Each Factor will now be looked at in greater detail.

### 5.4.3.b Factor 1: Means and Achievement

The main variables here were: the three *Learning Means* variables (*Initial, Final, Overall*), *Dropout*, *Command*, and *Failure*.

#### 5.4.3.b.i Initial Learning Means

This describes the means used at the outset of the learning history. Raw data is given below:

## Table 5.4.3/ii

### *Initial Learning-Means*: Raw Data

| Categories | Language tokens |
|---|---|
| classwork-only | 61 |
| parallel | 9 |
| self-instruction-only | 54 |
| **Total** | **124** |

Table 5.4.3/ii reveals a fairly even balance between starting languages in class (61) and by self-instruction (54); parallel (class + self-instruction) means are unusual (7/124) at this initial stage.

A Discriminant Analysis test[49] linked increasing dominance of classwork with high *Command* and low *Dropout*, confirming the Factor Analysis findings.

### 5.4.3.b.ii *Final Learning Means*

This describes the means used when learning was abandoned, or at time of interview. Raw data is given below:

## Table 5.4.3/iii

### *Final Learning-Means*: Raw Data

| Categories | Language tokens |
|---|---|
| classwork-only | 7 |
| parallel | 33 |
| self-instruction-only | 84 |
| **Total** | **124** |

Here, by contrast with *Initial Learning Means*, a striking majority of languages (84/124) end up being brushed up or maintained by self-instruction alone.

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[49] See Appendix A5.xv for data table.

A Discriminant Analysis test (excluding the other *Learning-Means* variables) failed to produce a Discriminant Function strong enough to be worth investigating. In other words, *Final Learning Means* per se is not strongly linked to achievement: its presence in the Factor Analysis is probably due to its unsurprising correlation with the other *Learning-Means* variables.

### 5.4.3.b.iii Overall Learning Means

This looks at the whole learning history. Raw data is given below:

**Table 5.4.3/iv**

*Overall Learning-Means*: **Raw Data**

| Categories | Language tokens |
|---|---|
| some classwork at all times | 29 |
| phases vary[50] | 52 |
| self-instruction-only at all times | 43 |
| Total | 124 |

At least some classwork during a Solo/Mixed learning project is more rule than exception: 81 (29 + 52) of the 124 languages. However, self-instruction-only at all times is by no means infrequent (43/124 languages).

A Discriminant Analysis test[51] reconfirmed the linkage between increasing dominance of classwork, high *Command* and low *Dropout*.

There seems to be an indisputable linkage between increasing *Command* and increasing dominance of classwork over self-instruction. But all the evidence gathered so far relates to Solo/Mixed languages - i.e. those involving at least some self-instruction. If we go one stage further, and cut out self-instruction altogether - i.e. look at Class-Only languages - will command be even higher? This is examined by Table & Graph 5.4.3/v

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[50] Some phases with classwork, some phases self-instruction-only

[51] See Appendix A5.xvi for data table.

below, which compares *Command* against an extended version of the *Overall Learning Means* variable. In the latter, the some classwork at all times and phases vary categories were combined to form a new mixed-means category (i.e. languages with at least some classwork and at least some self-instruction), and Class-Only data was added in the form of a new class-only at all times category:

Table 5.4.3/v

Language Tokens, by *Command* and *Overall Learning Means*

(including Class-Only data)

| | | *Overall Learning Means* | | |
|---|---|---|---|---|
| | | self-instruction-only at all times | mixed-means | class-only at all times |
| *Command* | beginner | 35 (81%) | 16 (20%) | 49 (52%) |
| | intermediate | 7 (16%) | 37 (46%) | 39 (41%) |
| | advanced | 1 (2%) | 28 (35%) | 6 (6%) |
| | total | 43 (100%) | 81 (100%) | 94 (100%) |
| Chi-square test | | $\chi^2$ 54.68, d.f. 4, p .000 (highly significant) | | |

Graph 5.4.3/v

It appears that most self-instruction-only languages (77%) do not get beyond beginner level; most class-only languages get to beginner (52%) or intermediate level (41%); with mixed-means, however, there is an even spread across the Command range, with a much higher percentage reaching advanced level (35%) than with the other two modes. These differences are highly significant. In other words, though class-only reaches higher Command levels than self-instruction-only, mixed-means gets highest of all.

Combining the Chi-Square and the Factor Analysis results, it would seem that a mixture of classwork and self-instruction, with classwork the dominant partner, is linked to better overall achievement than either in isolation. So, if self-instruction has an add-on effect on top of classwork, when does it act? Unfortunately, we have solely negative evidence: only at the Final stage does self-instruction not adversely affect Command. The lack of positive evidence is probably due to the fact that Final Learning Means is a very crude instrument for answering this question: a measure of absolute learning time might well have pinpointed when self-instruction "kicks in". Nevertheless, it appears that self-instruction gives a boost to classwork at later rather than earlier proficiency levels.

The direction of causation is not revealed by these methods, however. In statistical terms, Mixed-Means might cause greater achievement, and/or Mixed-Means may be chosen by learners with the best achievement potential.

5.4.3.b.iv Dropout

Raw data is shown below:

Table 5.4.3/vi

Dropout: Raw Data

| Categories | Language tokens |
|---|---|
| continuing | 71 |
| abandoned | 53 |
| Total | 124 |

A Discriminant Analysis test[52] confirmed the Factor 1 links between increased *Dropout* on the one hand, and dominance of <u>self-instruction</u> on the three *Learning Means* variables plus low *Command* on the other. *Failure*, however, is not a predictor of *Dropout*. An interesting finding was a tendency, amongst a sub-group of languages, for higher *Dropout* to be predicted by increased *Country Experience*.

*Dropout* appears far from random at Individual-Language level, though it is much weaker at Learner-Profile level (Section 5.4.2.d.iv). In other words, it appears to be largely dependent on the learning situation of individual languages rather than on learner self-image.

5.4.3.b.v *Command*

Raw data is shown below:

Table 5.4.3/vii

*Command*: Raw Data

| Categories | Language tokens |
|---|---|
| beginner | 51 |
| intermediate | 44 |
| advanced | 29 |
| Total | 124 |

There is a reasonable spread of tokens across the three proficiency bands. A Discriminant Analysis test[53] confirmed the linkage of *Command* to all Factor 1 and Factor 2 variables (Table 5.4.2/i), with the exception of *Final Learning Means* and *Dropout*.

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[52] See Appendix A5.xvii for data table.

[53] See Appendix A5.xviii for data table.

5.4.3.b.vi *Failure*

Raw data is shown below:

Table 5.4.3/viii

*Failure*: Raw Data

| Categories | Language tokens |
|---|---|
| successful | 93 |
| so-so | 18 |
| failed | 13 |
| Total | 124 |

The majority - three-quarters - of language-learning experiences are seen as successful. The Factor Analysis showed only a weak correlation (.40) between *Failure* and the other Factor 1 variables (Table 5.4.2/i); and an attempted Discriminant *Analysis* failed to generate any effects worth considering[54]. Thus it appears that success/failure ratings at Individual-Language level have even less grounding in external-achievement terms than at Learner-Profile level.

## 5.4.3.c Factor 2: Environment Effects

The main variables here were *Country Experience* and *Command*. *Command* has already been described in Section 5.4.3.b.v.

5.4.3.c.i *Country Experience*

Raw data is shown below:

---

[54] No Function over the .40 canonical correlation threshold.

## Table 5.4.3/ix

### Country Experience: Raw Data

| Categories | Language tokens |
|---|---|
| none | 24 |
| holidays | 59 |
| residence | 39 |
| missing[55] | 2 |
| Total | 124 |

The great majority of logged language tokens (holidays + residence = 98) show at least some L2-country experience. A Discriminant Analysis test[56] confirmed the Factor-Analysis link of longer *Country Experience* with increased *Command*, and also the link, amongst a certain sub-group of languages, with higher *Dropout* (cf. Section 5.4.3.b.iv).

### 5.4.3.d Factor 3: Language-Family and Learning-Means

This links *Exoticism* and *Final Learning Means*; the latter has already been examined in Section 5.4.3.b.ii. The *Exoticism* variable (+/- Romance/Germanic) examines the degree of cognacy to the learner's L1 (English). Related variables - not included in the main model for reasons detailed in 5.3.2.b - are *L3 Distance*, which examines the degree of cognacy to other languages known, and *Language Name*.

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[55] Inadvertently left unlogged on interview protocols.

[56] See Appendix A5.xix for data table.

5.4.3.d.i *Exoticism*

Raw data is given below:

Table 5.4.3/x

*Exoticism*: Raw Data

| Categories | Language tokens |
|---|---|
| Romance/Germanic | 105 |
| non-Romance/Germanic | 19 |
| Total | 124 |

The vast majority of language tokens (105/124) are Romance/Germanic. A Discriminant Analysis test failed to generate a Discriminant Function worth analysing. In other words, the target language's cognacy to English does not appear to have much link with achievement or learning-process features. Even at Learner-Profile level (Section 5.4.2.b.i), *Exotic Experience* was mainly a question of language numbers (the more languages learnt, the more the chance of having experience in a non-Romance/Germanic one): links to process or achievement per se were absent.

5.4.3.d.ii. *L3 Distance*

There is a possibility (cf. Literature Review 2.3.4) that an existing foreign language may be a more accessible model than the mother tongue when learning a new foreign language. A crude attempt to examine this was made by examining other languages (L3s) which the learner had learnt in the same family as the target language (L2). Raw data is shown in Table 5.4.3/xi:

Table 5.4.3/xi

*L3 Distance*: Raw Data

| Categories | Language tokens |
|---|---|
| no cognate FLs known | 76 |
| cognate FL(s) known | 48 |
| Total | 124 |

An attempted Discriminant Analysis, however, met with as little success as the *Exoticism* Analysis - no Function was generated worth considering[57]. One possible reason for this is the variable's dubious validity as a means of determining potential transfer - as discussed in 5.3.2.b, *L3 Distance* only registers the presence of a fellow language-family member, but without a chronological dimension it cannot tell which language might have influenced which.

*L3 Distance*'s fuzzy validity, however, cannot fully explain away the lack of cognacy effects on language achievement. With both cognacy markers showing no effects, similar reasons must be sought why both dogs did not bark.

5.4.3.d.iii. *Language Name*

Raw data is shown in Table 5.4.3/xii:

### Table 5.4.3/xii

### *Language Name*: Raw Data

| Categories | Language tokens |
|---|---|
| French | 45 |
| Spanish | 20 |
| German | 16 |
| Italian | 12 |
| Portuguese | 5 |
| Chinese (Putonghua) | 4 |
| Dutch | 4 |
| Hungarian | 3 |
| Japanese | 3 |
| Russian | 3 |
| Cantonese | 2 |
| Greek (Modern) | 2 |
| Norwegian | 2 |
| Gaelic (Scottish) | 1 |
| Hebrew | 1 |
| Swedish | 1 |
| **Total** | **124** |

---

[57] No Function over the .40 canonical correlation threshold.

A wide variety of languages is being learned: most of the tokens, but only half of the types (8 of the 16 categories in the table) are Romance/Germanic. The dominance of the "big four" - French (45 tokens), Spanish (20), German (16) and Italian (12) - is marked, however: the other 12 languages all have counts of 5 or less. French, at 45, has more than double the tokens of its nearest rival, Spanish (20).

A Discriminant Analysis test was run comparing *Language Name* against the scalar Individual-Language variables to see if language-type was connected to achievement and process variables. The results are shown in Table and Graph 5.4.3/xiii below (see Section 5.3.4.c for an analysis guide):

### Table 5.4.3/xiii

*Language Name*: Discriminant Analysis;

Independent Variables: Individual-Language

| A. DISCRIMINATORY POWER OF FUNCTION | |
|---|---|
| | Function 1 |
| A1. %age of dataset variance accounted for | 100.00% |
| A2. Canonical correlation | .73 |
| **B. MAKEUP OF FUNCTIONS** | |
| **B1. Suggested Name** | |
| | Function 1 |
| | Initial learning means |
| **B2. Key-Variable:Function Coefficient Matrix** | |
| | Function 1 |
| *Initial Learning Means* | 1.00 |
| **B3. Independent-Variable:Function Correlation Matrix** (Key variables, plus non-Key ≥.40) | |
| | Function 1 |
| *Initial Learning Means* | 1.00 |
| *Overall Learning Means* | .52 |

**Graph 5.4.3/xiii:** *Language Name* **(Individual-Language Functions)**
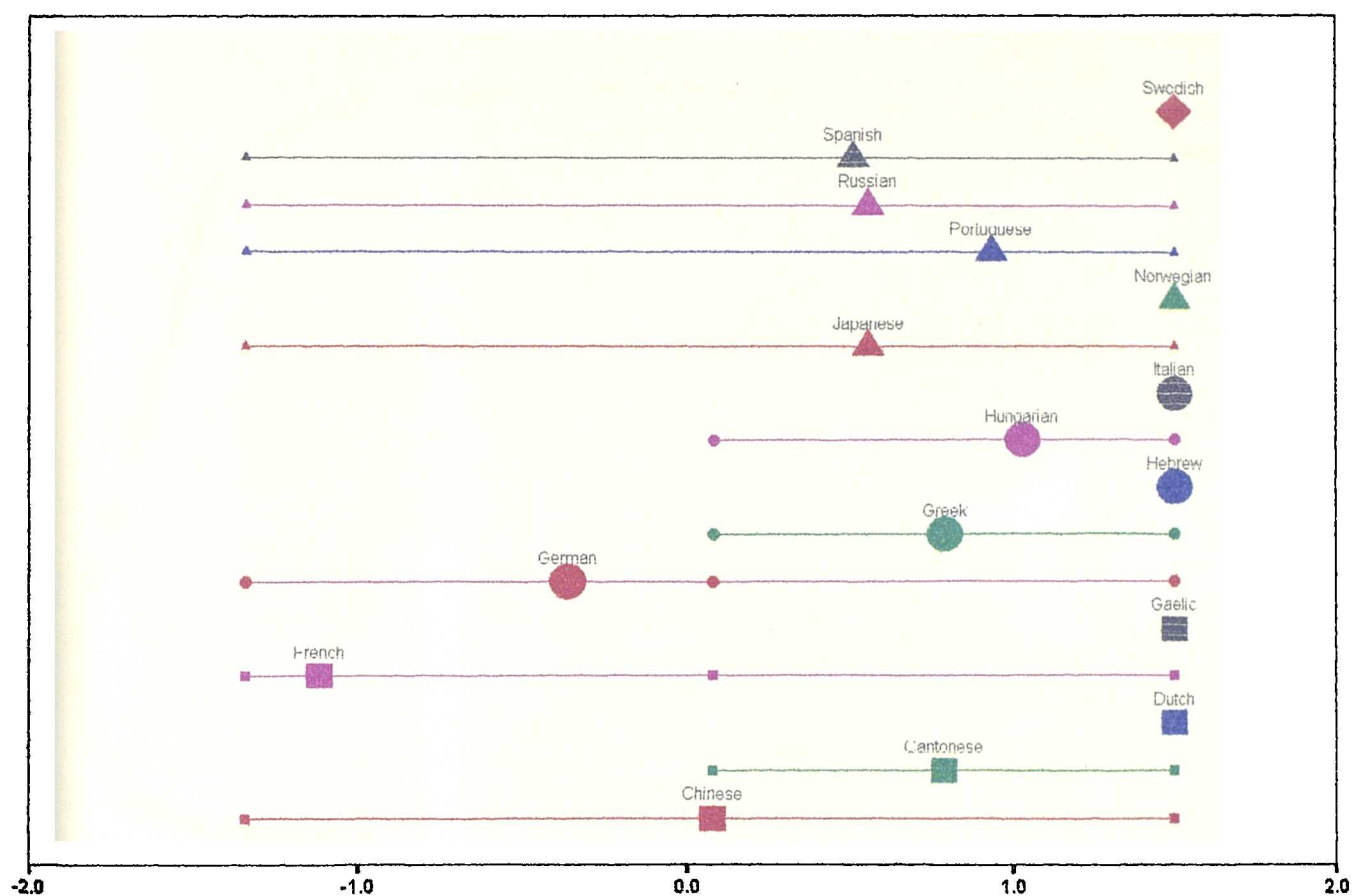


Function 1 : Initial learning means (classwork-only >> self-inst-only)

large symbols = means, small symbols = individual values

The canonical correlation of .73 shows that *Language Name* is fairly strongly linked with the Individual-Language variables. One Function is enough to account for the differences between them. The Coefficient Matrix shows that the Function is made up of only one variable: *Initial Learning Means*, though the Correlation Matrix shows that this implies a correlation (.52) with *Overall Learning Means*. The Function was titled "Initial learning means".

As there is only one Function, the Graph only needs one axis - the horizontal one - to show it. The left-hand (low-scoring) end corresponds to the classwork-only extreme,

and the right-hand (high-scoring) end to the self-instruction-only extreme. The mean value of each language is shown by a large symbol; individual-learner values, where these differ, are shown by small symbols[58]. For legibility's sake, each language's symbols are joined by a line.

French (pink squares) has the lowest, i.e. most classwork-dominated, mean value (about -1.2). As French is the first foreign language in British schools, this is hardly surprising; indeed, more surprising is the fact that one or more individuals start it in self-instruction-only mode (small pink square at maximum score: approx. 1.5). As a common second foreign language in British schools, a similar (though weaker) tendency for German (red circles: mean about -0.4) to be classwork-first is equally unsurprising.

Other results are also unsurprising - except perhaps the fact that *all* learners of Italian start out with self-instruction-only as *Initial Learning Means* (mean and all individual values at maximum Function score) - along with languages such as Dutch, Gaelic, etc.

It is possible that the numerical dominance of French may have warped other findings, especially in the *Initial Learning Means* area pinpointed by this test. To investigate this possibility, *Initial Learning Means'* own Discriminant Analysis (reported in Section 5.4.3.b.i, full table in Appendix A5.xv) was re-run with the 45 French cases excluded[59]. The results, however, were virtually the same: in other words, the dominance of French does not appear to have warped the Individual-Language data.

### 5.4.3.e Summary of Individual-Language Findings

Once again, as in the Learner-Profile data, we see a strong linkage between proficiency and preferred learning means. Self-instruction-only at all times gives the worst prognosis in *Command* terms, class-only at all times better, and mixed means - albeit with classwork the dominant element - best of all. The benefits of adding self-

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[58] As with the 2-Function Graphs, a small symbol denotes 1 or several individuals.

[59] See Appendix A5.xx for data table

instruction to classwork appear to lie in the later stages of learning, though a preference for mixed learning means may be an effect of proficiency as well as its cause. There is strong variation between individual languages in terms of favoured *Learning Means*.

High *Command* is also linked to low *Dropout* and to longer *Country Experience* - though the link is not three-way (in some cases, residence in the L2 country actually predicts *higher Dropout*).

Success/failure and language-cognacy factors are not strongly related to learning process and achievement.

# 5.4.4 GROUP/Keyword and protocol data

### 5.4.4.a Introduction

A key element of the interview data consisted of the learners' open-ended replies to questions about materials, processes, strategies and other factors affecting self-instruction proper (classwork only entered the picture if learners specifically chose to compare the two means). A combined quantitative and qualitative approach is used for analysing these replies. A Factor Analysis of the GROUP Quality variables gives a framework for a detailed presentation of raw data, where GROUP and Keyword counts are fleshed out by insights and quotations trawled from the interview protocols. Whereas the Factor Analysis and raw-count data aims at showing how representative or statistically generalisable the findings are, the protocol trawl aims to give an overview of *all* the items and opinions mentioned by learners, regardless of how representative such items and opinions are - for it is felt that, as long as we have a quantitative safety-net, insights even from one learner can act as useful input to the materials-design and learner-training process.

### 5.4.4.b Factor Analyses

Factor Analyses were attempted on the following sets of variables:

- **Keyword Mention and Quality combined**: test failed outright;
- **Keyword Mention alone**: analysis rejected (sampling adequacy below .50 threshold);
- **Keyword Quality alone**: ditto;
- **GROUP Mention and Quality combined**: ditto;
- **GROUP Mention alone**: analysis rejected (no Rotated Factor solution could be generated);
- **GROUP Quality alone**: analysis successful.

Failed analyses are not necessarily unwelcome. In the two "Mention and Quality combined" tests, for example, unsuccessful Factor Analyses indicate that quality of reported experience is independent from frequency of mention. If quality of experience

had been found to be dependent on an underlying articulacy factor, by contrast, it would have called the whole self-report method into question.

Keywords remain stubbornly independent of each other in all respects, however - perhaps because many of them are low-frequency, making it difficult for the Factor Analysis method to sort the signal from the noise.

Table 5.4.4/i below shows the results of the successful GROUP Quality analysis:

## Table 5.4.4/i

## GROUP Quality Variables: Factor Analysis

| | | | | | A. Sampling adequacy | | | | .57 |
|---|---|---|---|---|---|---|---|---|---|
| **B. Percentage of Dataset Variance Accounted For** | | | | | | | | | |
| | Fr1 | Fr2 | Fr3 | Fr4 | Fr5 | Fr6 | Fr7 | Fr8 | Fr9 |
| Per Factor % | 16.3 | 8.4 | 7.4 | 7.0 | 6.5 | 5.8 | 5.2 | 5.1 | 4.2 |
| Cumulative % | 16.3 | 24.6 | 32.0 | 39.0 | 45.5 | 51.3 | 56.5 | 61.6 | 65.8 |
| **C. Variable:Rotated-Factor Correlation Matrix (correlations ≥ .40 only)** | | | | | | | | | |
| | Fr1 | Fr2 | Fr3 | Fr4 | Fr5 | Fr6 | Fr7 | Fr8 | Fr9 |
| *ASSESSMENT* | .76 | - | - | - | - | - | - | - | - |
| *SPEAKING* | .58 | - | - | - | - | - | - | - | - |
| *PEOPLE* | .40 | .64 | - | - | - | - | - | - | - |
| *LANG.-CONTRAST* | -.43 | - | - | - | - | .40 | .40 | - | - |
| *METALANGUAGE* | -.58 | - | - | - | - | - | - | - | - |
| *STRATEGIES* | - | .59 | - | - | - | - | - | - | - |
| *USABILITY* | - | .58 | - | - | - | - | .53 | - | - |
| *GRAMMAR* | - | .54 | .47 | - | - | - | - | - | - |
| *COMPONENTS* | - | .49 | - | - | - | - | - | - | - |
| *WRITING* | - | - | .77 | - | - | - | - | - | - |
| *VOCABULARY* | - | - | .61 | - | - | - | - | - | - |
| *INPUT* | - | - | - | .78 | - | - | - | - | - |
| *LISTENING* | - | - | - | .66 | - | - | - | - | - |
| *ENJOYABILITY* | - | - | - | .51 | .57 | - | - | - | - |
| *PUBLISHERS* | - | - | - | - | .82 | - | - | - | - |
| *PRACTICE* | - | - | - | - | .48 | - | - | - | - |
| *CLASSWORK* | - | - | - | - | - | .70 | - | - | - |
| *MOTIVATORS* | - | - | - | - | - | .59 | - | - | - |
| *READING* | - | - | - | - | - | .51 | .51 | - | - |
| *EFFORT/PLANNING* | - | - | - | - | - | .42 | - | .54 | - |
| *TECHNOLOGY* | - | - | - | - | - | - | .82 | - | - |
| *PACING* | - | - | - | - | - | - | - | .74 | - |
| *EXPERTISE* | - | - | - | - | - | - | - | .68 | - |
| *MULTIPLE* | - | - | - | - | - | - | - | - | .88 |

**Table 5.4.4/i (continued)**

| Suggested Names | |
| --- | --- |
| Factor 1 | Learning style |
| Factor 2 | Strategic skill |
| Factor 3 | Language content |
| Factor 4 | Heard input |
| Factor 5 | Published package use |
| Factor 6 | Classwork and motivation |
| Factor 7 | Controlled-speed input |
| Factor 8 | Good language learner |
| Factor 9 | Multi-track learning |

Nine Factors were produced.

**Factor 1** - "Learning Style" - has both positive and negative correlations with its key variables. This means that it sorts learners into a continuum: at one end of the continuum, they would have helpful experiences with:

- *ASSESSMENT* (.76 correlation with Factor),

- *SPEAKING* (.58), and

- *PEOPLE* (.40),

and problematic experiences with:

- *METALANGUAGE* (-.58),

- *LANGUAGE-CONTRAST* (transfer, learnability: -.43).

At the other end of the continuum, they would find the former, communicative-feedback group problematic, but the latter, language-form group helpful. This continuum bears a close resemblance to the notion of learning style (experiential↔studial) posited by several authors (e.g. Ellis R., 1989).

The other Factors are less complex. Each shows a bundle of variables on which an individual learner would have similar experiences (whether helpful, neutral, or problematic):

**Factor 2** - "Strategic skill" - combines package *COMPONENTS* (Keywords *CourseCassette*, *CourseVideo*, etc.) with miscellaneous *STRATEGIES*. *PEOPLE* appear to be viewed here more as tools for learning than as conversational partners

(which seemed to be the case in Factor 1). To a certain extent, *GRAMMAR* work also seems to involve general strategic skills.

**Factor 3** I named "Language content", as it also combines a reappearance of *GRAMMAR* with *VOCABULARY*. *WRITING* seems to be a favoured way of practising these two "language nuts-and-bolts" areas - or at least, the same people have good (or bad) experiences with them.

**Factor 4** ("Heard input") combines *INPUT* (Keywords *Content/Syllabus*, proficiency-*Level*, *Authentic/Realistic*, delivery-*Speed*, etc.) with *LISTENING*, indicating that this Factor seems to isolate the ability to cope with full-speed listening - something which gives the bonus of *ENJOYABILITY* when it succeeds (but the reverse when it fails).

In **Factor 5** - "Published package use" - the key item is package *PUBLISHERS* and series (.82), which are generally rated in *ENJOYABILITY* terms and in the effectiveness of the *PRACTICE* activities they provide.

**Factor 6** covers a rather diverse range of fields. The core element appears to be *CLASSWORK* (.70), which provides *MOTIVATION* and discipline (*EFFORT/ PLANNING*). *MOTIVATION*, however, appears also to be provided by *READING* (probably extensive, in this case, in contrast to Factor 7 below); *READING* appears to be aided by positive transfer and a perception that the L2 is intrinsically easy (*LANGUAGE-CONTRAST*).

**Factor 7** was named "Controlled-speed input", as it seems to deal with intensive text work, where the speed is controllable (as opposed to Factor 4, which is more concerned with full-speed listening). The *TECHNOLOGY* GROUP (language labs, walkmen, cassette recorders) - where *USABILITY* is a key criterion - shows the means by which listened input can be slowed down. Hence with *READING* in this Factor we are probably also dealing with more intensive processing - though positive *LANGUAGE-CONTRAST* factors again help, as in the more extensive Factor 6 techniques.

In **Factor 8** - "Good language learner" - perceptions of language aptitude, etc. (*EXPERTISE*) are linked to the *EFFORT/PLANNING* skills of self-*Discipline* and *Time* management, which seem to correspond to the "metacognitive" strategies

identified by several authors (Literature Review 2.4.3.c.i). The link to the ability to cope with a package's assumed learning rate - *PACING* - is intriguing.

**Factor 9** is composed solely of the ability to successfully combine *MULTIPLE* learning-means, packages, etc.

### 5.4.4.c GROUP, Keyword and Protocol Data: Introduction

Here an in-depth picture is given of the interview data by presenting Mention and Quality data for each GROUP and its component Keywords, followed by lists of items from the protocols themselves. These "items" - many of which, but not all, correspond to Keywords - are selected on a qualitative basis: the criterion for listing is not how often an item is mentioned, but whether it adds to our picture of the learners, their experiences, strategies and advice.

Quotations from the interview protocols are added for illustration (abbreviations expanded, [ ] = researcher comment, [S01]-[S70] = subject-numbers). The data is presented in sub-sections corresponding to the Factors just isolated in the GROUP Quality Analysis. Besides Mentions (the number of interviewees citing an item), the term "Instances" is also used. This refers to the number of actual citations (problematic and/or helpful) of a GROUP/Keyword; there may be more than one such citation per learner.

### 5.4.4.d Factor 1 (Learning style)

Factor 1 is made up of two opposed clusters: an "experiential" cluster - *ASSESSMENT*, *SPEAKING* and *PEOPLE* - and a "studial" cluster - *METALANGUAGE* and *LANGUAGE-CONTRAST*. The individual GROUPs will be looked at in this order.

#### 5.4.4.d.i *ASSESSMENT*

As the strongest contributor to the strongest Factor, the *ASSESSMENT* GROUP is a key indicator of overall satisfaction. Raw numeric data is given in Table 5.4.4/ii:

Table 5.4.4/ii

*ASSESSMENT*: Mention and Quality Data

| GROUP          Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|
| | | problematic | | mixed | | helpful | |
| | | Raw | % | Raw | % | Raw | % |
| *ASSESSMENT* | 30 | 10 | 33% | 8 | 27% | 12 | 40% |
| *Assessment/Feedback* | 21 | 9 | 43% | 2 | 10% | 10 | 48% |
| *Progress* | 14 | 10 | 71% | 1 | 7% | 3 | 21% |
| *Exam* | 6 | - | - | - | - | - | - |
| *SelfCorrection* | 5 | - | - | - | - | - | - |

Verdicts of *ASSESSMENT* are varied (problematic and helpful roughly in balance). The same is true for the largest Keyword (*Assessment/Feedback*: 21 Mentions). Sense of *Progress* is mentioned more as a lack than as a benefit (10/14 problematic).

A qualitative trawl through the protocols showed:

★  All 18 Problematic *ASSESSMENT* instances complained of its lack.

★  Other-*Assessment* came from:

•  *PEOPLE*[60], either formally or informally: "informants [...] correct his essays" [SO9]; "rehearses language to himself before real-life event [then] remembers what [was] said and asks for feedback from native speakers" [S17];

•  "native-speaker country conversation [gives] feedback on progress" [S47];

•  tests/*Exams*;

•  *CLASSWORK*.

★  Self-*Assessment* was of:

•  *Vocabulary*: "test yourself English [to] French, check in dictionary" [S01];

•  *Grammar*: "Deutsch Direkt: [...] used for self-correction of grammar (letter to grandma)" [S56];

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[60] Italicisation, which denotes GROUP and Keyword variables, indicates cross-links to the sections describing the items in question.

- *Pronunciation.* "Linguaphone: [...] self-correction of pronunciation; feedback: listen to self vs. original" [S17];

- *Speaking:* "in target-language environment much better: input from all sides, self-correction" [S52].

★ *Progress* could be defined in terms of:

- pages covered: "Hugo: [...] nice and thin, [gives] feeling of progress" [S39];

- deliberately-set *Goals:* "sets herself target (e.g. learn 5 verbs/read 2 stories by end [of] week, write essay in less than 1 hour) → satisfied: sense of progress" [S40];

- real-life performance: "native-speaker country conversation → feedback on progress" [S47].

★ Attrition is usually put down to gaps in learning, but also to old age: "age (elderly): forgetting" [S62].

5.4.4.d.ii *SPEAKING*

This is the second GROUP at the "experiential" end of the Learning-style cline. Raw numeric data is given in Table 5.4.4/iii:

Table 5.4.4/iii

*SPEAKING*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|-------|----------|----------|---------|---|-------|---|--------|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *SPEAKING* | | 53 | 7 | 13% | 21 | 40% | 25 | 47% |
| | *Conversation* | 34 | 6 | 18% | 5 | 15% | 23 | 68% |
| | *Pronunciation* | 26 | 5 | 19% | 5 | 19% | 16 | 62% |
| | *Speaking* | 25 | 7 | 28% | 5 | 20% | 13 | 52% |

*SPEAKING* is a high-mention GROUP (53 Mentions) which gets largely mixed to helpful ratings. Its 3 Keywords - all of them sizeable - get largely helpful ratings, however. A qualitative trawl through the protocols gave the following observations:

★ *Conversation* and *Speaking* practice may come from:

- *Controlled* practice, especially cassette work: "like cassettes: [...] reading, listening to dialogues [is] good, [gives] realistic language input, → helps speaking; use repeating techniques → speaking" [S18];

- "gapped conversations on cassette" [S40];

- *Class*work: "helps with speaking, complements teach-yourself" [S13];

- *NativeSpeaker Conversation*, which can also generate *Confidence*: "confident re. speaking ability (generated by native-speaker country experience)" [S56];

- *StudyBuddies*: "study buddy group: practice in conversation" [S31].

★ Barriers to *Conversation* and *Speaking*:

- lack of pedagogic activities, as a defect of:

  ◊ specific courses: "[Teach-Yourself series:] no speaking practice, unreal, dead" [S52],

  ◊ or of self-tuition methods in general: "can't have conversations" [S37];

- embarrassment about *Speaking* to a cassette (mentioned by several learners): "speaking in lab is embarrassing" [S51];

- lack of real-life *Confidence*: "self-conscious about speaking, difficult to get courage" [S11].

★ *Pronunciation* strategies:

- cassette/video work: "Linguaphone: [...] teaches speaking, pronunciation (Swedish, Dutch), self-correction of pronunciation; feedback: listen to self vs. original" [S17];

- auditory rehearsal: "rehearse words to oneself: learning, pronunciation, speaking practice (especially lists, e.g. numbers, months)" [S25];

- interactive *Conversation*: "interaction with native speakers in native-speaker country [is] good for learning colloquial language, idioms, pronunciation" [S02]; "conversation with non-native speakers [...], pronunciation, feedback" [S63];

- *Dictionary* work (e.g. S05);

- use of *Informants*: "daughter [was] Chinese informant, [...] made cassette (pronunciation)" [S62].

★ Written phonemic representations:

- some could use English-based phonics and even phonetic symbols (e.g. S61);

- others found them unusable: "pronunciation guides - 'what letters sound like' - impossible to get from scratch" [S59].

★ *Pronunciation* problems:

- difficult L2 phonology (e.g. S46, S70);

- difficult orthography: "Portuguese more difficult than Spanish (pronunciation difference script:sounds)" [S30];

- perceived lack of aptitude (e.g. S46);

- no *CourseCassette* available;

- *Pronunciation* tackled by an unassimilable one-off introduction: "cassette: 35-minute introduction to all Chinese phonetics - 'listening to noises' - not useful - *too much at once, without meaning*" [S69];

- lack of feedback: "class would give feedback, especially with reference to pronunciation" [S33].

★ Liking for certain phonologies could play a *Motivational* role: "like[s] Italian sounds, culture, doesn't like sounds of Dutch" [S43].

### 5.4.4.d.iii *PEOPLE*

This is the third GROUP at the "experiential" end of the Learning-style cline. Table 5.4.4/i shows that its correlation with Factor 1 is quite weak (.40) - in fact it correlates more strongly (.64) with Factor 2 ("Strategic Skill"). This indicates that using other *PEOPLE* to aid learning is partly determined by how experiential one's learning style is, and partly by one's general strategic competence.

Raw numeric data is given in Table 5.4.4/iv:

Table 5.4.4/iv

*PEOPLE*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *PEOPLE* | | *58* | *3* | *5%* | *11* | *19%* | *44* | *76%* |
| | Country | 43 | 4 | 9% | 4 | 9% | 35 | 81% |
| | NativeSpeaker | 37 | 2 | 5% | 5 | 14% | 30 | 81% |
| | StudyBuddy | 18 | 1 | 6% | 0 | 0% | 17 | 94% |
| | Informant | 16 | 1 | 6% | 0 | 0% | 15 | 94% |
| | ExpatCommunity | 6 | - | - | - | - | - | - |

*PEOPLE* is one of the two strongest GROUPs in Mention terms (58). It gets largely helpful ratings, as do its Keywords. Three of the Keywords relate to native-speaker people and settings: the generic *NativeSpeaker*; *Country*; and *ExpatCommunity* (i.e. L2 communities in Britain). The other two refer mainly to non-native speakers: *StudyBuddy*, and language *Informant*.

The protocols reveal:

★ Half the problematic instances (7/14) are due to lack of the people or setting concerned.

★ Uses of *NativeSpeakers*:

 • correspondence (*Writing*);

 • can supply learning material: "pen-friends send reading materials, personal information" [S40];

 • interaction and *Country* visits/residence frequently act as impetus to learning: "residence (projected) is motivator" [S11];

 • *Conversation* (especially in the *Country*) is a good way of getting "real"/colloquial *Input*, *Feedback* on performance, and self-*Confidence*;

 • *ExpatCommunity*: Spanish restaurant visits with *StudyBuddies* (S58), German church (S61);

 • foreign lovers are useful - "French girlfriend helps" [S25]

★ Problems with *NativeSpeakers*:

- family ties can also hinder: "German: mother's language, resisted it" [S46];

- *NativeSpeakers* may be hard to understand: "different dialects [...] → listening problems" [S66], "speed of native speakers too high, difficult to catch, [so] use English" [S04],

- talking with them may be daunting: "lacks confidence in native-speaker conversation" [S07],

- and not everyone may be supportive of a foreigner's efforts: "enthusiasm, *adapting to non-native-speaker (Germany) - opposite in France!*" [S13];

- they may also know English (or an L3) too well: "English spoken by French friends in France: restricts opportunity" [S13].

★ A *NativeSpeaker Teacher* is a possible bonus of *CLASSWORK*: "native speaker conversation (class)" [S03].

★ *StudyBuddies*:

- give *Speaking*, *Listening*, *Writing* practice and *Vocabulary* input: "writing for group, [...] conversation" [S62], "informing each other about vocabulary" [S31];

- give mutual help: "listen, work together, provide each other with input, conversation practice" [S27];

- but *Listening* to non-native speakers may be artificially easy [S31].

★ *Informants* (native and non-native speakers):

- the distinction between *Informant* and *Study*/conversation *Buddy* may not be clear-cut;

- pen-friends as *Informants*: "about cultural matters (e.g. school)" [S40].

★ Learning exchange: "mutual conversation correction" [S47].

★ Language learning is often a "whole family enterprise" [S03]: "daughter [was] Chinese informant" [S62]; "boyfriend is [...] study buddy" [S12].

5.4.4.d.iv *METALANGUAGE*

This is the strongest GROUP at the "studial" end of the Learning-style cline (correlation
-.58: Table 5.4.4/i). Raw numeric data is given in Table 5.4.4/v:

Table 5.4.4/v

*METALANGUAGE*: Mention and Quality Data

| GROUP          Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|
| | | problematic | | mixed | | helpful | |
| | | Raw | % | Raw | % | Raw | % |
| *METALANGUAGE* | 12 | 5 | 42% | 1 | 8% | 6 | 50% |
| Metalanguage | 9 | - | - | - | - | - | - |
| Explanations | 5 | - | - | - | - | - | - |

*METALANGUAGE* is a relatively low-frequency GROUP (12 Mentions only).
Nevertheless, learners have sharply-opposed experiences of coursebook language: 6
give helpful mentions, 5 problematic, and only 1 is mixed. Nevertheless, they mostly
concur on what metalanguage *should* be like:

★ Clear, explicit language is liked, and inadequate exposition is complained of: "non-
explicit: different forms are confusing, disturbing (don't know why)" [S23].

★ A "friendly, [...] not too intimidating" [S05] approach is liked, and "difficult"
metalanguage is objected to.

★ long-winded exposés can result in input overload: "[...] not so easy to follow: lots of
explanation and examples" [S16].

★ Code:

• the mother tongue is preferred for linguistic information: "grammar book -
better in English!!" [S61], "English metalanguage = useful reference" [S67];

• but some prefer the L2 for activity instructions: "main fault in tapes is English
commentary, annoying when repeatedly listening to French texts" [S59];

- an excessively iconic approach is disliked: "difficult, dry" [S16][61].

### 5.4.4.d.v LANGUAGE-CONTRAST

This is the other GROUP at the "studial" end of the Learning-style cline. Its correlation with Factor 1 is weak (-.43), because it also participates in Factors 5 and 6, where it seems related to READING (Table 5.4.4/i). LANGUAGE-CONTRAST covers the areas postulated as important in the Language-Contrastive Factors section of the Materials Assessment Checklist (Section 3.2, Checklist Item 1); the Factor-Analysis data, however, indicates that its link with learning is likely to be a complex one. Raw numeric data is given in Table 5.4.4/vi:

### Table 5.4.4/vi

### LANGUAGE-CONTRAST: Mention and Quality Data

| GROUP         Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|
| | | problematic | | mixed | | helpful | |
| | | Raw | % | Raw | % | Raw | % |
| LANGUAGE-CONTRAST | 23 | 6 | 26% | 6 | 26% | 11 | 48% |
| Transfer | 16 | 2 | 13% | 2 | 13% | 12 | 75% |
| Learnability | 13 | 6 | 46% | 2 | 15% | 5 | 38% |

The GROUP is of moderate frequency (23 Mentions) and of varied Quality. Of the two Keywords, Transfer proper gets mainly helpful ratings (12/16), whereas intrinsic Learnability is much less positive (5/13 helpful, 6/13 problematic).

A qualitative look at the protocols adds the following details:

★ Transfer:

- both L1 (first-language) and L3 (other-language) transfer are mentioned, though L3 transfer may perhaps be stronger if available: "French words interfere with Spanish (more than English)" [S64];

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[61] The only such comment, this concerned Hungarian in Words and Pictures (Erdos et al, 1982) - one of the two Hungarian packages focused on in the Materials Checklist and the Learner Diary.

- not only *Vocabulary*, but also *Grammar* may be transferred: "Latin: help in vocabulary for Romance languages, grammar for German" [S31];

- perceptions of cognacy may have little philological grounding: "Spanish similar to German [...]: helps" [S48];

- can aid *Reading* and *Listening*: "[French videos:] cognates/loan words helped" [S06], "Latin, French useful for cognates ⇨ reading" [S67: Spanish and Italian];

- with one learner, *lack* of cognacy is a plus point: "enthusiastic about Japanese, especially script: because of difference from other languages!" [S46];

- the same language may simultaneously interfere with and aid L2 learning: "Norwegian: German, English was a help: cognates [...] but German interfered" [S49];

- L2 *Metalanguage* can prevent L1 interference: "Deutsch Direkt video good: no English, avoids transfer problems" [S33].

★ *Learnability*:

- language learning in general may be perceived as "difficult task in itself: high memory-load" [S04];

- *Pronunciation*, *Grammar*, and *Script* are pinpointed as areas of intrinsic ease/difficulty.

### 5.4.4.e Factor 2 (Strategic Skill)

In order of correlation strength, this contains the GROUPs *PEOPLE*, *STRATEGIES*, *USABILITY*, *GRAMMAR* and *COMPONENTS*. They will be looked in this order; *PEOPLE*, however, has already been examined in Section 5.4.4.d.iii above.

<u>5.4.4.e.i *STRATEGIES*</u>

Raw data is given in Table 5.4.4/vii below:

Table 5.4.4/vii

*STRATEGIES*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *STRATEGIES* | | 57 | 2 | 4% | 12 | 21% | 43 | 75% |
| | *Dictionary* | 20 | 1 | 5% | 1 | 5% | 18 | 90% |
| | *Memorisation* | 20 | 4 | 20% | 0 | 0% | 16 | 80% |
| | *Inductive* | 18 | 6 | 33% | 0 | 0% | 12 | 67% |
| | *Revision* | 17 | 0 | 0% | 0 | 0% | 17 | 100% |
| | *Notetaking* | 12 | 0 | 0% | 0 | 0% | 12 | 100% |
| | *Repetition* | 11 | 4 | 36% | 0 | 0% | 7 | 64% |
| | *RepeatedTask* | 7 | - | - | - | - | - | - |
| | *ThinkingInL2* | 5 | - | - | - | - | - | - |
| | *Teaching* | 4 | - | - | - | - | - | - |
| | *Deductive* | 3 | - | - | - | - | - | - |
| | *KeywordImagery* | 3 | - | - | - | - | - | - |
| | *Etymology* | 2 | - | - | - | - | - | - |

The miscellaneous-*STRATEGIES* group is of high occurrence (57: equal third in Mention terms); it contains a relatively high number of medium to low-incidence Keywords. Several Keywords score very strongly helpful ratings - *Revision* and *Notetaking*, for example, are two of the three 100%-helpful Keywords in the study. This is perhaps not only due to their intrinsic merit: the strongly helpful Keywords describe autonomous strategies, which will tend to be used and mentioned only by those learners who find them helpful. Coursebook-led strategies (e.g. *Repetition* and *Inductive*), by contrast, get less favourable ratings, probably because learners have to use them willy-nilly.

Keyword by Keyword, the protocols add:

★ *Dictionary*:

• most were identified as bilingual: monolingual *Dictionaries* were not mentioned;

• encoding searches: "dictionary (bilingual): use for production ➪ find out phrases, especially when (a) writing letters, ➪ learning, (b) speaking in native-speaker country - very useful" [S19];

• decoding searches: "reading with a dictionary (authentic, work-related texts)" [S15];

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- *Pronunciation* searches (e.g. S05);

- building word-families: "keep list from reading, make word-families (e.g. noun → verb) - revise later, memorise" [S26];

- self-*Assessment* (see 5.4.4.d.i: *ASSESSMENT* for quote);

- for coursebook glossaries, see 5.4.4.f.ii: *VOCABULARY* below;

- tourist phrasebooks: good for reference or revision, but restricted as learning means: "revising grammar/vocabulary" [S35], "would have needed grammar base [...] OK for survival [...] learn phrases" [S26].


★ *Memorisation*:

- books are better than cassettes (S38);

- of items from *Reading* texts (e.g. S26 above);

- by re*Writing*: "record words on paper: writing it helps memorisation" [S15];

- from *Notetaking*: "take vocabulary (notebook) to learn while out walking (in plastic bag: weatherproofed)" [S25];

- while walking (above), on bus (S33);

- weekly *Memorisation* goals (see 5.4.4.d.i: *ASSESSMENT* for quote);

- boring (no *Variety*) in isolation (S46);

- difficult - the main problem with language-learning: "rote-learning: important but dislikes it" [S57].


★ *Inductive* vs. *Deductive* presentation of input:

- *Deductive* approaches are preferred for *Grammar* (see 5.4.4.e.iii:*GRAMMAR* below);

- but otherwise, opinions are divided as to which is better.


★ *Revision*:

- informally, spin-off of learning: "[A Vous La France:] tapes useful/good - revising school memories" [S01];

- as deliberate strategy: "revising past units later" [S17].


★ *Notetaking* - often in special notebook:

- normally contains translation equivalents: "writing vocabulary book (words + translations)" [S49];

- in the L2 *Country*: "have a notebook whilst travelling [...] to write down" [S59];

- both *Writing* and later *Reading* of notes help *Memorisation* (q.v.).

★ *Repetition* of output - "use repeating techniques → speaking" [S18]: liked on the whole, but:

- "feels unnatural" [S38],

- difficult with *Authentic Listening* texts (S23).

★ *RepeatedTask*:

- as part of syllabus: "BBC Italian: phrases repeated a lot" [S22];

- as learner strategy: "repeated listening → comprehension questions: useful method" [S23].

★ *ThinkingInL2*:

- includes mental preparation: "rehearses language to himself before real-life event" [S17].

★ *Teaching* the L2 - "teaching French helps!" [S07].

★ *KeywordImagery*:

- for Japanese *Script*: "katakana and hiragana books [...]: mnemonic/picture system: helps" [S31];

- L1-L2 puns (S46).

★ L2-internal *Etymology*:

- "even Chinese/Japanese" [S46];

- word-families from *Dictionary* (cf. S26 quote above).

## 5.4.4.e.ii USABILITY

This GROUP, involved both in Factor 2 (correlation .58) and Factor 7 (correlation .53), is concerned with the ease of use of published and autonomous materials. In Factor 2 it seems to address general aspects, whereas in Factor 7 it focuses on the usability of playback technology for repeated listening, and on reading. Raw data is given in Table 5.4.4/viii below:

**Table 5.4.4/viii**

*USABILITY*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality problematic Raw | % | mixed Raw | % | helpful Raw | % |
|---|---|---|---|---|---|---|---|---|
| *USABILITY* | | 35 | 9 | 26% | 14 | 40% | 12 | 34% |
| | *Clarity/Structure* | 19 | 5 | 26% | 4 | 21% | 10 | 53% |
| | *Usability* | 12 | 6 | 50% | 2 | 17% | 4 | 33% |
| | *Obtainability* | 10 | - | - | - | - | - | - |
| | *Expense* | 7 | - | - | - | - | - | - |
| | *Legibility* | 5 | - | - | - | - | - | - |
| | *ReferenceValue* | 5 | - | - | - | - | - | - |

*USABILITY* is of moderately-high Mention (35) and varied Quality (9/35 problematic, 14/35 mixed, 12/35 helpful). The protocols add the following details:

★ Audio cassettes are more usable than videos:

• easier access to *Playback* technology: "no competition!" [S58];

• "can do something else at the same time" [S03].

★ And books most usable of all: "easy: can read anywhere" [S29].

★ *LanguageLabs*: see 5.4.4.k.i:*TECHNOLOGY* below.

★ Valued materials features:

• wide range of available packages/materials: "lots of choice in Japanese books" [S31];

• *Clarity* and *Structure* of learning path: "courses [= packages] are better because they structure learning" [S01]; "Teach-Yourself good: [...] well-structured, simplest-first syllabus" [S49];

• thorough coverage: "grammar book for reference [...]: detailed, [...] thorough - prefixes as well as suffixes" [S12];

• transcripts of *Listening* texts (discussed in 5.4.4.g.ii: *LISTENING* below);

• *ReferenceValue*: "Modern Spanish; [...] useful for reference, well-indexed, clarity" [S65];

• *Legibility*: "large print helps: when beginning a language, deciphering letter-by-letter is important, especially in non-Latin script" [S61].

★ Problems:

- un*Obtainable* and non-existent materials: "public library - too few tapes" [S31]; "videos: problem of access (sometimes, in France only)" [S02]; "Swiss German: little published listening material" [S29]; "specialist materials (LSP) difficult to get, expensive" [S44: engineer];

- visual clarity: "preferred cassette (less strain on eyes than video: small screen)" [S32].

★ *Expense*:

- usually, lower is better - "language lab is free (cf. class costs!)" [S23], "little money for buying courses" [S29] -

- but investment may act as an incentive: "class course would have given [...] financial pressure" [S01].

## 5.4.4.e.iii *GRAMMAR*

This GROUP is involved both in Factor 2 (correlation .54), where its strategic aspect appears stressed, and in Factor 3, (correlation .47), which focuses on its status as an element of linguistic form. Raw data is given in Table 5.4.4/ix below:

### Table 5.4.4/ix

### *GRAMMAR*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|-------|----------|----------|---------|-----|-------|-----|--------|-----|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *GRAMMAR* | | 39 | 9 | 23% | 15 | 38% | 15 | 38% |
| | *Grammar* | 39 | 9 | 23% | 15 | 38% | 15 | 38% |

*GRAMMAR* is a one-Keyword GROUP of moderately high concern to learners (39 Mentions), which provokes varied reactions (9/39 problematic, 15/39 mixed, 15/39 helpful).

★ Problems with *Grammar*:

- too little (11/24 problematic instances);

- too much, or badly presented (13/24);
- it may be seen as intrinsically difficult (S28);
- some languages (especially German) are seen as having more difficult *Grammars* than others: "German is a harder language than French/Spanish, especially because of grammar" [S40];
  - ✦ one learner (S31) notes that an agglutinative *Grammar* (Japanese) is easier than an analytic one (German again);

★ Clear, simple *Explanations* and reference résumés are liked, and a failure to tackle *Grammar* (usually with the purpose of inductive learning) is often complained of: (for quote, see S23 in 5.4.4.d.iv:*METALANGUAGE* above).

★ *Controlled* exercises tend to be found useful (though disliked in excess): "good revision ('back to basics') - substitution, controlled practice" [S12].

★ Some advocate *Grammar*-first, others *Grammar*-later - contrast previous quote with: "better to have general basis, then grammar" [S40];

★ Autonomous strategies:
- traditional sources can fill out a lack of *Grammar* in the main course/method: "read French notes from school (grammar)" [S08]; "BBC [...] grammar not important, but good enough as basis for further grammar study in grammar textbook (especially German)" [S44];
- *Transfer* (for quote, see S31 in 5.4.4.d.v:*LANGUAGE-CONTRAST*);
- holophrasis: "learning 'common phrases' - verbs, phrases, grammar example sentences" [S20]; "short stories, magazines [...]: write out verb paradigm sentences" [S40];
- *Translation*: "back-translation (English → French → English) helps grammar" [S40];
- real-text *Reading* as input: "Spanish history-book, in Spanish ([...]: past tense!)" [S46];
- *Conversation* as *PRACTICE* means: "'conversation class': non-formal study buddy and informant: good for conversation, sentence structure" [S19].

5.4.4.e.iv COMPONENTS

This GROUP is involved in Factor 2 only, where it is a relatively weak contributor (correlation .49). Raw data is given in Table 5.4.4/x below:

Table 5.4.4/x

COMPONENTS: Mention and Quality Data

| GROUP          Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|
| | | problematic | | mixed | | helpful | |
| | | Raw | % | Raw | % | Raw | % |
| COMPONENTS | 50 | 10 | 20% | 19 | 38% | 21 | 42% |
| CourseCassette | 40 | 8 | 20% | 14 | 35% | 18 | 45% |
| CourseVideo | 14 | 4 | 29% | 3 | 21% | 7 | 50% |
| Grammarbook | 10 | - | - | - | - | - | - |
| CourseBroadcasts | 4 | - | - | - | - | - | - |
| Call | 2 | - | - | - | - | - | - |
| VocabBook | 2 | - | - | - | - | - | - |

This GROUP's Keywords cover generic materials-types designed specifically for language-learning, whether package components (CourseCassette, CourseVideo, CourseBroadcasts, Call) or stand-alone sources (Grammarbook, VocabBook). All of these materials-types, however, are adequately described elsewhere, with the skills they support. Thus the four package components are described in Section 5.4.4.g.ii:LISTENING (see also 5.4.4.k.i:TECHNOLOGY); and Grammarbook and VocabBook are described in 5.4.4.e.iii:GRAMMAR and 5.4.4.f.ii:VOCABULARY respectively.

5.4.4.f Factor 3 (Language Content)

In order of correlation strength, this contains WRITING, VOCABULARY and GRAMMAR. GRAMMAR, however, has already been examined in Section 5.4.4.e.iii above.

5.4.4.f.i *WRITING*

Raw data is given in Table 5.4.4/xi below:

### Table 5.4.4/xi

### *WRITING*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *WRITING* | | 24 | 4 | 17% | 2 | 8% | 18 | 75% |
| | *Writing* | 18 | 1 | 6% | 0 | 0% | 17 | 94% |
| | *Script*[62] | 10 | - | - | - | - | - | - |

Experiences of *WRITING* and its main Keyword *Writing* are generally good (18/24 helpful mentions). Writing tended to be cited in reply to the "Independent learner strategies" interview question (Table 5.3.2/iii) rather than to the "Helpful/Problematic materials features" questions, indicating that writing work is largely autonomous.

The protocols reveal:

★ The only problem cited for the *Writing* Keyword was its absence: "little support of writing" [S63].

★ Input sources:

 • *Reading* texts: "extensive reading: good for vocabulary, writing, grammar" [S12];

 • *Dictionary* work: "[bilingual] dictionary: use for production, find out phrases (especially when writing letters)" [S19].

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[62] One instance of *Script* related to *READING* and was thus tagged with the latter GROUP. The same learner, however, also gave an instance of *Script* in a *WRITING* context, so it was not thought worthwhile to classify *Script* as a two-GROUP Keyword.

★   *PRACTICE* activities:

- copying (not wholeheartedly recommended!): "copies out each Linguaphone chapter: helps writing, though a bit boring" [S17];

- dictation: "language lab: transcribing news" [S65];

- gapped/guided (*Controlled*) activities: "listen and repeat and write, fill in gaps - good course" [S27]; "España Viva: [...] guided letter-writing" [S46];

- *Translation*: "Spanish newspapers: translate into English" [S48];

- letters to native-speaker friends (or even relatives: e.g. S56's grandmother) - frequently mentioned;

- creative *Writing*: "write poems, songs [to] pattern; write puzzles (vocabulary learning) - fun!" [S40];

- *StudyBuddies* (for quotes, see 5.4.4.d.iii:*PEOPLE* above).

★   *Writing* as strategy for memorisation and self-testing: for details, see 5.4.4.d.i:*ASSESSMENT*, 5.4.4.e.i:*STRATEGIES* above.

★   *Script*:

- some found non-Latinate characters a barrier - "Cantonese - [...] script impossible" [S51] -

    but others enjoyed them: "enthusiastic about Japanese, especially writing: because of difference from other languages!" [S46].

- *KeywordImagery* for Japanese characters: for quote, see 5.4.4.e.i:*STRATEGIES* above;

- irregular sound-symbol correspondence was disliked: "Swiss German: [...] speaking-script difference" [S29].

## 5.4.4.f.ii *VOCABULARY*

Raw data is given in Table 5.4.4/xii below:

Table 5.4.4/xii

*VOCABULARY*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality problematic | | mixed | | helpful | |
|-------|----------|----------|------------|------|------|------|------|------|
| | | | Raw | % | Raw | % | Raw | % |
| *VOCABULARY* | | 45 | 7 | 16% | 11 | 24% | 27 | 60% |
| | *Vocabulary* | 44 | 6 | 14% | 5 | 11% | 33 | 75% |
| | *Style* | 14 | 13 | 93% | 0 | 0% | 1 | 7% |

This is a fairly high-scoring GROUP (45 Mentions), reflecting the feeling that it is "important to build up vocabulary" [S37]; *Vocabulary* is the second-most mentioned Keyword (44 Mentions). Besides *Vocabulary*, which is largely well-regarded (75% helpful), the *VOCABULARY* GROUP contains the Keyword *Style* (usually referring to coursebook text and vocabulary-list content). The latter, at 93% problematic, is the most unpopular Keyword of the whole dataset in percentage terms.

A trawl through the protocols adds:

★ Package features:

   • repeated/recycled input is seen as useful: "BBC Italian: phrases repeated a lot [S22];

   • glossaries are highly-rated - "vocabulary list at end of chapter useful for revision" [S22] - and their lack can cause irritation: "only English-Spanish dictionary [= glossary], not Spanish-English [S30].

★ Lexical *Content/Syllabus*:

   • colloquial/holiday language is usually valued - "[BBC] French and Digame: good: situational/functional, high-need vocabulary/phrases for holidays" [S32] - and over-formal lexis bemoaned: "[news videos:] no colloquial language / idioms" [S02];

   • though specialised occupational lexis may sometimes be needed: "[A Vous La France] - oriented towards tourism; but wasn't meeting needs [for] technical, formal, PhD thesis reading" [S15];

   • outdated *Content* was a frequent complaint: "Linguaphone: many words out of date" [S17];

- over-slim *Content* was sometimes complained of: "didn't broaden vocabulary fast enough" [S59];

- phrases/sentences appear more learnable than individual words: "[Ich Kann Es] - vocabulary lists: sentences/idioms as well as words: useful" [S29].

★ Autonomous input sources:

- *Dictionary* work (see 5.4.4.e.i:*STRATEGIES* for details);

- published word-lists: "[5000 Commonly Used Words] - verbs, phrases: read phrases → memorise" [S20];

- tourist phrasebooks (e.g. S35);

- cognate *Transfer* (see 5.4.4.d.v:*LANGUAGE-CONTRAST* for details);

- *Reading* authentic texts, parallel texts and annotated readers: "best: parallel-language [...] texts (literature): [...] can refer to L1 texts (saves dictionary look-up); [...] learning vocabulary in context (not isolating vocabulary into a list)" [S13];

- *Authentic*/off-air videos/cassettes, sometimes with language-lab vocabulary-/ question-sheets: "news video: extensive listening [helps] vocabulary" [S09], "video films: useful phrases for in conversation" [S19];

- *NativeSpeaker Conversation*: "good for learning colloquial language, idioms" [S02];

- *StudyBuddies* (see 5.4.4.d.iii:*PEOPLE* for details);

- non-native *Informant*: "daughter [was] Chinese informant: learnt situational phrases" [S62].

★ Learning, practice and self-assessment strategies:

- oral *Repetition* - "listen and repeat: use in car >> recognition, imitation [of] sounds [...], phrases" [S69]

- (re)*Writing* items as *Memorisation* technique (see 5.4.4.e.i:*STRATEGIES* for quote);

- making word-lists for later *Memorisation*, "writing vocabulary book (words and translations)" [S49];

- setting staged learning targets (for quote, see 5.4.4.d.i:*ASSESSMENT*);

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- *KeywordImagery* and *Etymology*: "English-Japanese puns for vocabulary learning - etymology ([L2-]internal, but even Chinese/Japanese) as vocabulary-learning strategy" [S46];

- *Translation*: "English-Spanish translations - language practice: vocabulary, grammar" [S65];

- making and solving word puzzles (for quote, see 5.4.4.f.i:*WRITING* above);

- self-testing of equivalents with bilingual *Dictionary* (see 5.4.4.d.i: *ASSESSMENT* for quote).


**5.4.4.g  Factor 4 (Heard Input)**

The key players here, in order of correlation strength, are *INPUT*, *LISTENING* and *ENJOYABILITY*.

5.4.4.g.i *INPUT*

Raw data is given in Table 5.4.4/xiii below:


Table 5.4.4/xiii

*INPUT*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| *INPUT* | | 53 | 8 | 15% | 24 | 45% | 21 | 40% |
| | *Content/Syllabus* | 26 | 5 | 19% | 10 | 38% | 11 | 42% |
| | *Level* | 22 | 10 | 45% | 2 | 9% | 10 | 45% |
| | *Input* | 20 | 5 | 25% | 3 | 15% | 12 | 60% |
| | *Authentic/Realistic* | 19 | 4 | 21% | 5 | 26% | 10 | 53% |
| | *Speed* | 12 | 8 | 67% | 1 | 8% | 3 | 25% |
| | *Dialogues* | 10 | - | - | - | - | - | - |
| | *TranslatedInput* | 7 | - | - | - | - | - | - |
| | *Examples* | 4 | - | - | - | - | - | - |
| | *Storyline* | 2 | - | - | - | - | - | - |

This relatively high-Mention GROUP (53 Mentions) contains a number of Keywords dealing with general issues around target language content and delivery, with the stress on the materials features themselves rather than on how input is mediated by learner strategies. Specific language areas (*GRAMMAR*, *VOCABULARY*) and skills (*LISTENING*, *READING*) are dealt with in the appropriate sections. The close link with *LISTENING*, however, is demonstrated by the fact that *INPUT* and *LISTENING* not only both participate in the present Factor, but also are not present in other Factors (Table 5.4.4/i). Judgements are varied, with mixed the strongest category (45%) at GROUP level.

The protocols add the following specific details:

★  Miscellaneous:

  •  *Variety* of input is appreciated;

  •  familiarity with *Content* helps: "Spanish history book in Spanish [...], already knows background content [...] read books in parallel: English, then German/ etc. translation" [S46];

  •  too much *Input* at the expense of *Practice* is not liked: "too much input at once, without practice" [S69];

  •  textbook *Dialogues* are often liked: "input for speaking; common expressions" [S47];

  •  *Storylines* are liked (though only 2 Mentions).

★  *Authentic* and *Realistic* texts:

  •  *Authentic* recordings are generally liked when chosen autonomously, but are often disliked in published packages. There seems to be a proficiency threshold below which *Authentic* listening is found too difficult, and hence disliked, but above which it is an enjoyable activity (cf. the real-text threshold mentioned in the Learner Diary: 4.2.1.a) - though the element of personalized learner choice may also play a role. Contrast "conversations with subtitles: difficult to understand word-for-word: dissatisfying" [S58: intermediate Spanish] with "video news: prepares for listening full-speed, stretching" [S11: advanced French].

- "*Realistic*" input texts (i.e. those which closely model L2 usage, though they may have been artificially-scripted) and real-life input are appreciated, however, and their lack bemoaned.

★ Text delivery *Speed*:

- over-high *Speed* - of materials or *NativeSpeakers* (see 5.4.4.d.iii:*PEOPLE* for quote) - is a frequent complaint, though others find natural-speed input vital (e.g. S11 in the last paragraph);

- over-slow *Speed* can also be disliked: "Linguaphone [...] unrealistically slow" [S30];

- control over *Speed* is liked: "films/news video: own speed, revise, rewind" [S02].

★ Difficulty *Level*:

- the right *Level* can be hard to find: "Façon De Parler: level too advanced, assumes a lot of knowledge [...] Mac [*Call* program]: a bit too basic, situational, not analytic enough" [S04];

- easy input can *Motivate*, however: "[schools TV *CourseBroadcasts*:] if basic, [it's] motivating (can understand)" [S13].

★ *Syllabuses*:

- situational *Syllabuses* are more often liked than disliked: "useful phrases, situational syllabus [helps] real-life survival" [S05] (contrast S04 above);

- there was only one specific mention of another *Syllabus*-type: "Teach Yourself Italian: boring: structural syllabus:" [S68].

## 5.4.4.g.ii LISTENING

In correlation terms, this is the second strongest variable in Factor 4. Raw data is given in Table 5.4.4/xiv below:

Table 5.4.4/xiv

*LISTENING*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *LISTENING* | | 53 | 8 | 15% | 11 | 21% | 34 | 64% |
| | *Listening* | 46 | 6 | 13% | 5 | 11% | 35 | 76% |
| | *RecordedText* | 18 | 0 | 0% | 7 | 39% | 11 | 61% |
| | *OnAir* | 10 | - | - | - | - | - | - |
| | *Understanding*[63] | 18 | 3 | 17% | 0 | 0% | 15 | 83% |

*LISTENING* is one of the most frequently-cited GROUPs (53 Mentions) - and the generic Keyword *Listening*, at 46 Mentions, is the most frequently-mentioned of all Keywords. *LISTENING* also focuses on two types of authentic text - non-package videos and audio cassettes (*RecordedText*), and live broadcasts and shows (*OnAir*[64]) - plus accounting for some of the cross-GROUP Keyword *Understanding*. *LISTENING* gets a largely helpful rating (34/53, or 64%).

The protocols add:

★ *Listening* is important: "too little listening practice" [S49] (cf. Learner Diary: 4.2.8).

★ The freedom to select materials autonomously often gives *IntrinsicInterest*: "films/news video: own speed, revise, rewind, select interesting bits" [S02];

★ For *Listening* as input to *Speaking*, *Pronunciation* and *Vocabulary*, see Sections 5.4.4.d.ii:*SPEAKING* and 5.4.4.f.ii:*VOCABULARY*.

★ For the use of *LanguageLabs*, cassette-players and walkmen, see 5.4.4.k.i: *TECHNOLOGY*.

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[63] This Keyword bridges two GROUPs; the tally of 18 *Mentions* includes those from *READING*.

[64] Not to be confused with broadcast language courses, which are covered under *CourseBroadcasts* (*COMPONENTS*).

★ For the role of cognate recognition, see 5.4.4.d.v:*LANGUAGE-CONTRAST*.

★ *StudyBuddies*:

- "[do] listen[ing] work together, provide each other with input" [S27];
- though listening to non-native speakers can be too easy [S31].

★ *NativeSpeakers*: besides interaction, "overhear conversations: listen in, especially children" [S70].

★ helpful materials features:

- *Authentic* (autonomously-used) text-types: films, satellite news videos, live radio/TV, songs, opera, recordings by native-speaker friends, lectures - all are enjoyed;
- repeatability of cassette input can solve the comprehensibility problem: "repeated listening → comprehension questions: useful method" [S23];
- comprehension questions (previous quote);
- video is better than audio - "visual really useful" [S02],
  though visuals can also distract: "a bit 'distracting' (too attractive) from concentrating on speaking/listened input" [S05].
- written back-up was seen as useful or even essential: "transcript helps for reference" [S03]; "cassette not usable without book" [S04];
- voices: "interesting mix of female and male voices, lively" [S01], "regional accents, ages [...] → unpredictability" [S67], "clear" [S22], "pleasant" [S46];
- opinions on subtitles were divided: "helped a lot in understanding" [S11] vs. "difficult to avoid" [S19].

★ problematic aspects

- "listening, etc. quite 'repetitive', not realistic" [S06],
- "lose concentration [...]: 20 minutes maximum span!" [S37];
- audiolingual and repetition-based courses: "audio-lingual Dutch [= Speak Dutch]: very dry" [S43];
- transcripts don't solve text:learner level mismatch problems (cf. *Authentic* discussion in 5.4.4.g.i:*INPUT* above), for the result may be "reading to help decipher, not listening" [S59].

★  Sub-skills:

- *Authentic* texts prepare for real-life *Listening*, including accepting partial *Understanding*: "French radio: getting attuned to language (not full comprehension)" [S13] -

  though not all learners agree: "[there's a] difference between [tapes] and real life" [S57];

- *Listening* for gist with easy texts (S13);

- coping with regional accents (S44);

- dictation (see 5.4.4.f.i:*WRITING* for quote).

## 5.4.4.g.iii *ENJOYABILITY*

In correlation terms, this is the third strongest variable in Factor 4 (Heard Input); it plays a role of similar magnitude (.50s correlation: Table 5.4.4/i) in Factor 5 (Published Package Use). Raw data is given in Table 5.4.4/xv below:

### Table 5.4.4/xv

### *ENJOYABILITY*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *ENJOYABILITY* | | 37 | 11 | 30% | 6 | 16% | 20 | 54% |
| | *Variety* | 16 | 10 | 63% | 2 | 13% | 4 | 25% |
| | *Enjoyability* | 14 | 3 | 21% | 2 | 14% | 9 | 64% |
| | *IntrinsicInterest* | 11 | 0 | 0% | 1 | 9% | 10 | 91% |

*ENJOYABILITY* is made up of the Keywords *Enjoyability* proper and *IntrinsicInterest*, both of which are favourably rated (9/14 and 10/11 helpful respectively) - and of *Variety*, which is much less so (10/16 problematic, with "boring" as a frequent qualifier).

★  Enjoyable aspects:

- modern, colloquial, humorous package materials;

- for many learners, *Authentic* listening materials (cf. discussion in 5.4.4.g.i: *INPUT* above);

- extensive *Reading*;

- creative *Writing* (cf. 5.4.4.f.i:*WRITING*);

- intellectual challenge: "puzzling it [reading text] out is fun!" [S60].

★ Unenjoyable features/activities:

- book without cassette: "a bit boring on its own" [S67];

- often, *Grammar*: "grammar books: very boring - prefer to ask native speakers" [S17];

- self-instruction per se: "a bit boring" [S23];

- enjoyable does not necessarily mean useful: "don't like [BBC French] books for learning [...] try to be 'fun', seem patronising (too frivolous: cartoons, etc.: younger market) - wants to get at information, not so useful for reference" [S19];

- with video, enjoyability risks distracting from learning: (for quote, see 5.4.4.g.ii:*LISTENING*).

### 5.4.4.h Factor 5 (Published Package Use)

In order of correlation strength, this contains *PUBLISHERS*, *ENJOYABILITY*, and *PRACTICE*. *ENJOYABILITY* was examined in the previous sub-section (5.4.4.g.iii).

### 5.4.4.h.i *PUBLISHERS*

Raw data is given in Table 5.4.4/xvi below:

Table 5.4.4/xvi

*PUBLISHERS*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *PUBLISHERS* | | 42 | 3 | 7% | 20 | 48% | 19 | 43% |
| | *Bbc* | 32 | 2 | 6% | 12 | 38% | 18 | 56% |
| | *Hugo* | 7 | - | - | - | - | - | - |
| | *TeachYourself* | 7 | - | - | - | - | - | - |
| | *Linguaphone* | 6 | - | - | - | - | - | - |
| | *Colloquial* | 5 | - | - | - | - | - | - |

Named *PUBLISHERS* and package series get a varied reception (48% mixed, 43% helpful), but not a hopelessly problematic one. The learner findings, therefore, appear to reject the "teach-yourself courses are beneath contempt" hypothesis, which - though rarely expressed overtly (e.g. Hayet 1990/91) - appears to be the default stance of mainstream classroom-based methodological opinion (cf. discussion in Section 1.1). Instead, it appears to support the conclusions of the Materials Checklist survey (Section 3.4), which sees much room for improvement but also much good practice in the published teach-yourself package field.

*Bbc* courses form by far the biggest contingent (32). As these have been favourably commented on, both by Roberts (1992, in press) and the present Materials Checklist survey (Section 3.3.1.a), it may be argued that they have biased the overall verdict on published packages. On the other hand, one can claim that the high Mention of *Bbc* courses is a result of their relatively high quality being recognised by learners (even in the Newcastle University Study Lab, there is no shortage of other published courses).

No other name scored more than 7 Mentions, which is too low for reliable verdicts to be pronounced. Moreover, from the protocols it is difficult to distil what is specific to the publisher/series out of what pertains to component-types, syllabus and methods in general - thus supporting the claim made in the Materials Checklist survey (3.3.1.b) that packages should not be seen as unanalysed wholes, but as collections of individual features, some of which may be problematic and some helpful.

These individual features are adequately discussed under their respective Keywords. Two specifically package-based points, however, emerge from a scan of the protocols:

★ *Bbc*'s holiday-based syllabuses, its videos and its moderate communicative/ inductive approach are the basis for many of its citations. Learners, however, disagree as to whether these features are helpful or problematic - in other words, it is difficult to make absolute value-judgements of packages even at an individual-feature level, as opinions can vary according to learner-internal factors.

★ As for *Linguaphone*, opinions differ about its methods, but its content is generally found to be dated.

5.4.4.h.ii *PRACTICE*

Raw data is given in Table 5.4.4/xvii below:

Table 5.4.4/xvii

*PRACTICE*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *PRACTICE* | | 29 | 5 | 17% | 7 | 24% | 17 | 59% |
| | *Controlled* | 17 | 1 | 6% | 3 | 18% | 13 | 76% |
| | *Translation* | 11 | 1 | 9% | 0 | 0% | 10 | 91% |
| | *Practice* | 9 | - | - | - | - | - | - |
| | *RealOutput* | 6 | - | - | - | - | - | - |
| | *Personalized* | 2 | - | - | - | - | - | - |

Leaving aside the generic *Practice*, two of *PRACTICE*'s Keywords relate overtly to controlled practice: *Translation* (11 Mentions) and other *Controlled* activities (17). The two free/communicative-practice Keywords are less prominent in Mention terms: *RealOutput* (6) and *Personalized* (2). Self-instruction methods appear better at supplying controlled than free practice: *Translation* and *Controlled* get strongly helpful ratings (91% and 76% respectively), whereas *PRACTICE* as a whole is only 59% helpful, implying a bias towards mixed/problematic on the other Keywords.

★ *Translation*

- seems to be mainly an autonomous rather than a coursebook-led strategy;

- is used for *Grammar* and *Vocabulary* self-testing, and for *Writing* practice (see 5.4.4.e.iii:*GRAMMAR*, 5.4.4.f.ii:*VOCABULARY* and 5.4.4.f.i:*WRITING* for quotes).

★ Other *Controlled* activities:

- gapped speaking exercises on cassette are widely liked: "gapped conversation: gives good self-assessment" [S44];

- also liked: gapped/guided *Grammar* and *Writing* exercises (see 5.4.4.e.iii: *GRAMMAR* and 5.4.4.f.i:*WRITING* for quotes);

★ Restrictions of package-led practice:

- there may be too much *Input* and too little *Practice* (see 5.4.4.g.i:*INPUT* for quote);

- too many highly-controlled activities can be unstimulating: "sometimes not enough practice questions (just substitution exercises: a bit too simple; e.g. translating more stretching)" [S31];

- cassette work can be "a bit 'user-unfriendly' compared to face-to-face conversation, especially audio [cassettes] - lack 'personal touch', individual adaptation" [S45].

★ Free/communicative practice:

- *NativeSpeaker Conversation*: "realistic pressures to communicate, time-pressure" [S48] - though it may be difficult to obtain: "not enough visits in native-speaker country, [therefore] little practice" [S35]

- "imaginary conversations" [S43] are a possible solution!

**5.4.4.j Factor 6 (Classwork and Motivation)**

This contains, in order of correlation strength: *CLASSWORK, MOTIVATORS, READING, EFFORT/PLANNING* and *LANGUAGE-CONTRAST*. The last-named was discussed under Factor 1 (Section 5.4.4.d.v).

5.4.4.j.i *CLASSWORK*

Raw data is given in Table 5.4.4/xviii below:

Table 5.4.4/xviii

*CLASSWORK*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *CLASSWORK* | | 30 | 4 | 13% | 2 | 7% | 24 | 80% |
| | *Class* | 30 | 4 | 13% | 2 | 7% | 24 | 80% |
| | *Teacher* | 5 | | | | | | |
| | *Peers* | 2 | | | | | | |

This medium-occurrence GROUP (30 Mentions) gets highly-favourable ratings (80% helpful) - in percentage terms, in fact, it is judged the second most helpful GROUP in the study. The GROUP is coterminous with the generic Keyword *Class*, though the Keywords *Teacher* and *Peers* also occur.

The protocols reveal:

★ About half the *Class* instances (14/30) advocate a combination of self-instruction and classwork rather than classwork alone: "teach-yourself important as back-up to class, often explicit" [S31];

  • though classwork makes the better first stage: "class basics (grammar), then teach-yourself" [S29].

★ All the problems with classwork are due to its absence;

  • a suitable class can be difficult to find (S04).

★  Classwork is helpful because it can provide:

- *NativeSpeaker Teachers* (see 5.4.4.d.iii:*PEOPLE* for quote),

- inspiring *Teachers* (S22);

- *Motivation* and *Discipline*: "difficult to keep self-discipline/routine without class" [S38];

- *Assessment/Feedback*;

- *Speaking* practice (see 5.4.4.d.ii:*SPEAKING* for quote);

- *Grammar* input (S64).

★  One-to-one teaching: "native-speaker colleague: formal teaching from book and conversation practice" [S70].

The protocols also have 22 explicit references to **self-instruction** (this does not have its own Keyword):

★  most advocate combining self-instruction with classwork;

★  3 advocate self-instruction in the L2 *Country*, or combined with naturalistic interaction;

★  there are a couple of negative comments: "boring" [S23], "no conversation" [S64];

★  and a couple of positive ones: "more explicit [than classwork]" [S31]; "teach-yourself is possible" [S44].

<u>5.4.4.j.ii *MOTIVATORS*</u>

Raw data is given in Table 5.4.4/xix below:

**Table 5.4.4/xix**

*MOTIVATORS*: **Mention and Quality Data**

| GROUP           Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|
| | | problematic | | mixed | | helpful | |
| | | Raw | % | Raw | % | Raw | % |
| *MOTIVATORS* | 58 | 12 | 21% | 20 | 34% | 26 | 45% |
| *Motivation* | 41 | 8 | 20% | 3 | 7% | 30 | 73% |
| *Need* | 28 | 14 | 50% | 4 | 14% | 10 | 36% |
| *Confidence* | 19 | 10 | 53% | 2 | 11% | 7 | 37% |
| *LearningPleasure* | 15 | 1 | 7% | 0 | 0% | 14 | 93% |
| *Culture* | 12 | 0 | 0% | 0 | 0% | 12 | 100% |
| *Expectations* | 2 | - | - | - | - | - | - |

At 58 Mentions, this is one of the two highest-occurrence GROUPs. Largely helpful Keywords are: *Motivation*, *LearningPleasure* and L2 *Culture* - the last-named, in fact, is one of the three 100%-helpful Keywords in the study. Less favourable are L2 *Need* and self-*Confidence*.

★   Sources of *Motivation* and *Confidence*:

  • clear learning *Goal*: "good motivation: clear goal (in a certain time): [...] living there" [S02];

  • holiday, residence (e.g. S02 above);

  • professional *Need*: "e-mail: to communicate in French" [S15], "work as translator in future" [S40];

  • general future value: "improve career prospects" [S06];

  • L2 friends, relatives, social contacts: "German church" [S60];

  • L2 *Culture*: "likes France itself" [S06], "buying L2 books" [S25];

  • intrinsic liking for the L2: "like French as a language" [S11];

  • language-*LearningPleasure*: "likes language learning" [S06];

  • inadequate L2 ability (positive anxiety): "rest of family speak better than her → motivators" [S03]; "not speaking Greek: motivated to learn!" [S38];

  • L1 not known in the L2 country: "in France, no English known, so had to speak French" [S08];

  • appropriate course *Syllabus/Content*: "BBC [...]: useful phrases, situational syllabus [help] real-life survival; memorable, give confidence to perform real-life tasks" [S05];

- classwork (S31): cf. 'working solo' below;

- *Exams*: "A-levels: motivators" [S40];

- language-learning and real-life success: "[schools broadcasts] motivating (can understand)" [S12], "confident about speaking ability (generated by [...] country experience" [S56].

★ Demotivators: lack/converse of the above, plus:

- a better L2-user as travelling companion: "partner's French good, so relied on him" [S03];

- L1 ghettoisation abroad: "international community in [...] country (few Spanish speakers)" [S66], "married to non-native speaker - no need for social contact" [S69];

- having an L2 family can also demotivate! (see 5.4.4.d.iii:*PEOPLE* for quote);

- lack of *Confidence* is only cited as affecting *Speaking*: "embarrassment about talking (risk-taking)" [S03];

- working solo: "no interaction with group of other learners [...]" [S01];

- unrealistic language-learning *Expectations*: "slow progress (higher expectations)" [S36].

## 5.4.4.j.iii *READING*

This GROUP bridges two Factors - Factor 6 (Classwork and Motivation) and Factor 7 (Controlled-Speed Input); it has exactly the same correlation with both Factors. The same is true for *LANGUAGE-CONTRAST*; hence one must regard these two GROUPs as closely-related. Raw data for *READING* is given in Table 5.4.4/xx below:

Table 5.4.4/xx

*READING*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *READING* | | *38* | *1* | *3%* | *2* | *5%* | *35* | *92%* |
| | *Reading* | 36 | 0 | 0% | 2 | 6% | 34 | 94% |
| | *Understanding*[65] | 18 | 3 | 17% | 0 | 0% | 15 | 83% |

*READING* is of moderately-high occurrence (38 Mentions). Most of these are accounted for by *Reading* proper (36 Mentions), especially as many of *Understanding*'s Mentions relate to *LISTENING* rather than *READING*. At 92% helpful, *READING* is the most favourably-rated GROUP in percentage terms.

The protocols reveal that, like *WRITING*, most *READING* activities appeared to be autonomous rather than package-led. Looking in detail:

★ Materials features:

  • graded tasks can give a sense of progress (S70);

  • one learner liked text + comprehension questions (S03);

  • glossaries enable one to outperform one's competence: "extensive reading with glossary, even if text advanced: puzzling it out is fun" [S60].

★ Strategies:

  • setting weekly *Reading Goals* (see 5.4.4.d.i:*ASSESSMENT* for quote);

  • joining an L2 library;

  • *Authentic* texts (widely favoured): newspapers, magazines, novels/ literature, "comics - read hundreds, e.g. on train [...] regular, manageable, [read one] every ± 2 days" [S69];

  • simplified readers, parallel texts (5.4.4.f.ii:*VOCABULARY*);

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[65] This Keyword bridges two GROUPs; the tally of 18 *Mentions* includes those from *LISTENING*.

- familiar subjects (including L2 texts known in L1 version) help *Understanding* (see 5.4.4.g.i:*INPUT* for quote);

- using L2 tourist materials for days out in Britain: "visiting (GB): use FL guide leaflets, not English! - read at home" [S40];

- informal *Reading* in the L2 environment: "in Spain: read everything" [S58];

- intensive work on non-Latin script: "[Japanese] newspaper: decipher characters" [S31][66];

- *Dictionary* look-up & recording of new lexis (see 5.4.4.f.ii:*VOCABULARY* for quote);

- using cognates to aid understanding (see 5.4.4.d.v:*LANGUAGE-CONTRAST* for quote).

★ *Reading* to learn:

  - *Reading* and *Notetaking*: "reads through, writes notes, [leads to] retention" [S55];

  - *Translation* as follow-up activity;

  - *Reading* aloud to native-speaker friends (S40);

  - reading for *Grammar*, *Writing* and *Vocabulary* (for quotes, see 5.4.4.e.iii: *GRAMMAR*, 5.4.4.f.i:*WRITING*, 5.4.4.f.ii:*VOCABULARY*) - but "literature [is] not much use for conversation" [S29].

★ Some languages are easier to read than other (even closely-related) ones: "Spanish easier than French: easier grammar, easier to read" [S30].

5.4.4.j.iv *EFFORT/PLANNING*

This GROUP bridges two Factors - Factor 6 (Classwork and Motivation) and Factor 8 (Good Language Learner); though it loads more strongly on the latter (a moderate .54 correlation, as opposed to a weak .42 on Factor 6), it will be discussed here. Raw data is given in Table 5.4.4/xxi below:

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[66] The only *READING* instance of *Script*: cf. footnote to Table 5.4.4/xi.

Table 5.4.4/xxi

*EFFORT/PLANNING*: Mention and Quality Data

| GROUP          Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|
| | | problematic | | mixed | | helpful | |
| | | Raw | % | Raw | % | Raw | % |
| *EFFORT/PLANNING* | 57 | 32 | 56% | 10 | 18% | 15 | 26% |
| *Time* | 41 | 31 | 76% | 4 | 10% | 6 | 15% |
| *Discipline* | 14 | 9 | 64% | 0 | 0% | 5 | 36% |
| *Routine* | 13 | 6 | 46% | 0 | 0% | 7 | 54% |
| *HardWork* | 12 | 8 | 67% | 0 | 0% | 4 | 33% |
| *Gaps* | 6 | - | - | - | - | - | - |
| *Goal* | 5 | - | - | - | - | - | - |
| *Maintenance* | 4 | - | - | - | - | - | - |

The metacognitive skills of *EFFORT/PLANNING*, at 57 Mentions, are one of the top four learner concerns. At 56% problematic, it is also one of the two most problematic GROUPs in percentage terms (the other being *EXPERTISE* at 57%); no other GROUPs score over 50% problematic. *EFFORT/PLANNING*'s biggest Keyword is finding *Time* (41 Mentions); with 31 (76%) problematic mentions, it is by far the most problematic Keyword in the whole dataset in raw-count terms, and the second most problematic in percentage terms. *Routine*-setting is the only *EFFORT/PLANNING* Keyword where helpful Mentions (7/13) outweigh problematic ones (6/13). The protocols add:

★ Learning *Goals*:

- clear, achievable long-term *Goals* motivate (for quote, see 5.4.4.j.ii: *MOTIVATORS*);

- short-term *Goals* as *Assessment* means (for quote, see 5.4.4.d.i: *ASSESSMENT*).

★ *CLASSWORK* sets up *Routines* and helps self-*Discipline* (for quote, see 5.4.4.j.i:*CLASSWORK*).

★ Organising skills:

- general: "a structured approach to teach-yourself is important" [S45];

- cassette work can be done at the same time as housework, driving, etc.: "using 'dead time' otherwise unused" [S69];

- *Routine*: "work every day" [S13], "a little, regularly" [S14];

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- "perseverance" [S13] helps;

- working on too many languages at once can overload the learner: "2 teach-yourself languages = too much!!" [S39].

★ Language *Maintenance* is important, for *Gaps* in learning lead to attrition (reverse *Progress*): "gaps can cause problems, feeling of backsliding" [S30].


## 5.4.4.k Factor 7 (Controlled-Speed Input)

In order of correlation strength, the key GROUPs here are *TECHNOLOGY*, *USABILITY*, *READING* and *LANGUAGE-CONTRAST*. The last three, however, have already been described, in Sub-Sections 5.4.4.e.ii, 5.4.4.j.iii and 5.4.4.d.v respectively.

### 5.4.4.k.i *TECHNOLOGY*

Raw data is given in Table 5.4.4/xxii below:

### Table 5.4.4/xxii

### *TECHNOLOGY*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
|---|---|---|---|---|---|---|---|---|
| *TECHNOLOGY* | | 24 | 8 | 33% | 5 | 21% | 11 | 46% |
| | *Languagelab* | 22 | 10 | 45% | 3 | 14% | 9 | 41% |
| | *Players* | 4 | - | - | - | - | - | - |

*TECHNOLOGY* (24 Mentions) consists mainly of *LanguageLab* (22), together with the miscellaneous category *Players* (4). Neither helpful nor problematic experiences prevail.

★ *LanguageLab* plus points:

- a good learning means: "regular attending Language Centre lab = good basis for rapid naturalistic learning in the native-speaker country" [S17];

- easy access (S17) and long opening hours: "open all day, can fit in with daily routine" [S05];

- "friendly staff" [S36] and "good atmosphere" [S40];

- no *Expense* involved: "cf. class costs!" [S23];

- "wide range of [...] resources" [S10], including satellite TV (S22).

★ *LanguageLab* minus points:

- may be disliked as a means (though only by one learner: S69);

- cassettes cannot be taken home (e.g. S01);

- lack of general information: "facilities weren't publicised enough!" [S02];

- inadequate indexing: "lack of indexing to news cassettes, difficult to find key items" [S08];

- *Call* programs are "difficult to get access" to (S31);

- getting to the lab is *Time*-consuming: "time constraints, especially for using language lab" [S20];

- embarrassment (lack of *Confidence*) about speaking out loud (5.4.4.d.ii: *SPEAKING*).

★ Cassette work in the car is popular, both because it solves both the *Time* and the embarrassment problem: "using 'dead time' otherwise unused" [S69]; "not embarrassing (no-one listening)" [S67];

★ Walkmen are very *Usable*: "can do something else at the same time!" [S58].

★ With videos, access to *Players* can be a problem (5.4.4.e.ii:*USABILITY*).


## 5.4.4.1 Factor 8 (Good Language Learner)

In order of correlation strength, the key GROUPs here are *PACING*, *EXPERTISE* and *EFFORT/PLANNING*. The last-named, however, has already been described in Sub-Section 5.4.4.j.iv.

5.4.4.1.i *PACING*

Raw data is given in Table 5.4.4/xxiii below:

Table 5.4.4/xxiii

*PACING*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|-------|----------|----------|---------|---|------|---|--------|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *PACING* | | 16 | 3 | 19% | 2 | 13% | 11 | 69% |
| | *Length* | 8 | - | - | - | - | - | - |
| | *Pace* | 4 | - | - | - | - | - | - |
| | *Gradient* | 3 | - | - | - | - | - | - |

This low-occurrence, generally favourable GROUP (16 Mentions) contains three Keywords describing assumptions that packages make as to how much input learners can assimilate. The protocols show:

★  New-input *Gradient*:

   •  gentle = good (e.g. S5);

   •  gentle = bad: "not concentrated enough input" [S25];

   •  steep = good: "Colloquial Hungarian: [...] more of it, stretching, going quicker, working more" [S70].

★  Unit/course *Length*:

   •  short = good: "short learning units" [S16]; "Hugo: [...] nice and thin >> feeling of progress" [S39];

   •  short = bad (S63);

   •  long = bad: "over-long units" [S30], "[Macmillan Spanish:] book very big >> daunting" [S39].

★  Activity *Pace*:

   •  fast = good (S50);

   •  own = good: "teach-yourself: can do it at own pace" [S29].

5.4.4.1.ii *EXPERTISE*

Raw data is given in Table 5.4.4/xxiv below:

Table 5.4.4/xxiv

*EXPERTISE*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *EXPERTISE* | | 14 | 8 | 57% | 0 | 0% | 6 | 43% |
| | *Aptitude* | 11 | 7 | 64% | 0 | 0% | 4 | 36% |
| | *Strategies* | 3 | - | - | - | - | - | - |
| | *Experience* | 2 | - | - | - | - | - | - |

This low-occurrence GROUP (14 Mentions) shows self-reports on one's abilities, with slightly more negative than positive judgements. By a narrow margin, in fact, it is rated as the most problematic GROUP in percentage terms (57%); and together with *EFFORT/PLANNING* at 56% problematic, it is one of the two GROUPs to score over 50% problematic. The three Keywords are general language *Aptitude* (11 Mentions), strategic skill/awareness (*Strategies*) and language-learning *Experience* (2).

The protocols add no further insights: they merely record the self-reports.

## 5.4.4.m Factor 9 (Multi-Track Learning)

This is a single-GROUP Factor.

5.4.4.m.i *MULTIPLE*

Raw data is given in Table 5.4.4/xxv below:

Table 5.4.4/xxv

*MULTIPLE*: Mention and Quality Data

| GROUP | Keywords | Mentions | Quality | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | problematic | | mixed | | helpful | |
| | | | Raw | % | Raw | % | Raw | % |
| *MULTIPLE* | | 32 | 3 | 9% | 5 | 16% | 24 | 75% |
| | *Multiple* | 23 | 3 | 13% | 4 | 17% | 16 | 70% |
| | *Basis* | 15 | 1 | 7% | 0 | 0% | 14 | 93% |

This moderate-Mention GROUP (32) looks at overt citations of using components, packages, learning means etc. *in combination*; most Mentions are helpful (75%). It contains the generic Keyword *Multiple* (23 Mentions), plus *Basis* (15) - the belief that one category forms a good initial foundation for further learning.

Another way of looking at the data is by what is being used in combination; the protocols show:

★   17/37 instances of *Multiple* learning means or strategies

★   8/37 *Multiple* packages or materials types (e.g. grammarbook)

★   5/37 *Multiple* package *COMPONENTS*,

★   3/37 languages (learning several languages at once),

★   4/37 mixed counts (usually saying that a package is a good *Basis* for learning in general).

Other comments:

★   Recommended means:

•   self-instruction and *CLASSWORK*, especially *CLASSWORK*-first (see 5.4.4.j.i: *CLASSWORK* for quotes);

•   self-instruction and naturalistic learning, whether self-instruction-first or in parallel: "regular attending [...] language lab is a good basis for rapid naturalistic learning in the native-speaker country" [S02]; "Italian: learnt [by] teach-yourself in native-speaker country" [S43].

★   Packages & materials-types:

  • "multiple packs: simultaneously, complement each other" [S66];

  • traditional sources (e.g. *Grammarbooks*) can fill out gaps in communication-based packages and classwork (see *5.4.4.e.iii:GRAMMAR* for quote);

  • *Bbc* courses form "a good introduction to the language" [S05].

★   Package components:

  • opinions are divided as to whether components should duplicate or complement each other: "lacked continuity of structure: written text different from cassette"; "best = tape and book should complement each other, not be the same thing repeated" [S59] (cf. transcripts debate: *5.4.4.g.ii:LISTENING*);

  • missing cassettes (or even books) can be a problem.

★   Learning multiple languages:

  • need not result in cross-language confusion: "2 teach-yourself languages: don't interfere" [S39]

  • but can overload the learner (see *5.4.4.j.iv:EFFORT/PLANNING* for quote).

★   Language areas:

  • some advocate *Grammar*-first, others *Grammar*-later (see *5.4.4.e.iii: GRAMMAR* for quotes; cf. also the *Inductive/Deductive* debate (*5.4.4.e.i:STRATEGIES*).

# GOING IT ALONE

**Part 2**

## 5.4.5 Learner-Profile and GROUP/Keyword Data: Cross-Links

### 5.4.5.a Introduction

The final Results section searches, by means of the Discriminant Analysis technique, for links between the Learner-Profile variables on the one hand and the GROUP/ Keyword tags on the other. The aim is to find out how concrete ratings of achievement and experience on the one hand interact with open-ended reports of materials-use, strategy-use and individual-learner characteristics on the other. The Learner-Profile Factor Analysis (Table 5.4.2/i) supplies the framework for this section, as was the case with the raw Learner-Profile data (Section 5.4.2).

### 5.4.5.b Factor 1: Class-Only Languages

The main variables here were, in order of correlation strength: *Class-Only Exotic Experience*, *Class-Only Language Count*, *Class-Only Maximum Command*, and *Total Language Count.*

#### 5.4.5.b.i *Class-Only Exotic Experience*

A Discriminant Analysis comparing this Learner-Profile variable against the GROUP Mention and Quality variables was successful. Results are shown in Table & Graph 5.4.5/i below:

**Table 5.4.5/i**

*Class-Only Exotic Experience*: Discriminant Analysis;

Independent Variables: GROUP *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 99.75% | 0.25% |
| A2. Canonical correlation | .46 | .03 |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | More writing, less strategies | - |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *WRITING Mention* | .85 | - |
| *STRATEGIES Mention* | -.75 | - |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| *WRITING Mention* | .69 | - |
| *STRATEGIES Mention* | -.55 | - |

**Graph 5.4.5/i: Class-Only Exotic Experience (GROUP Function)**
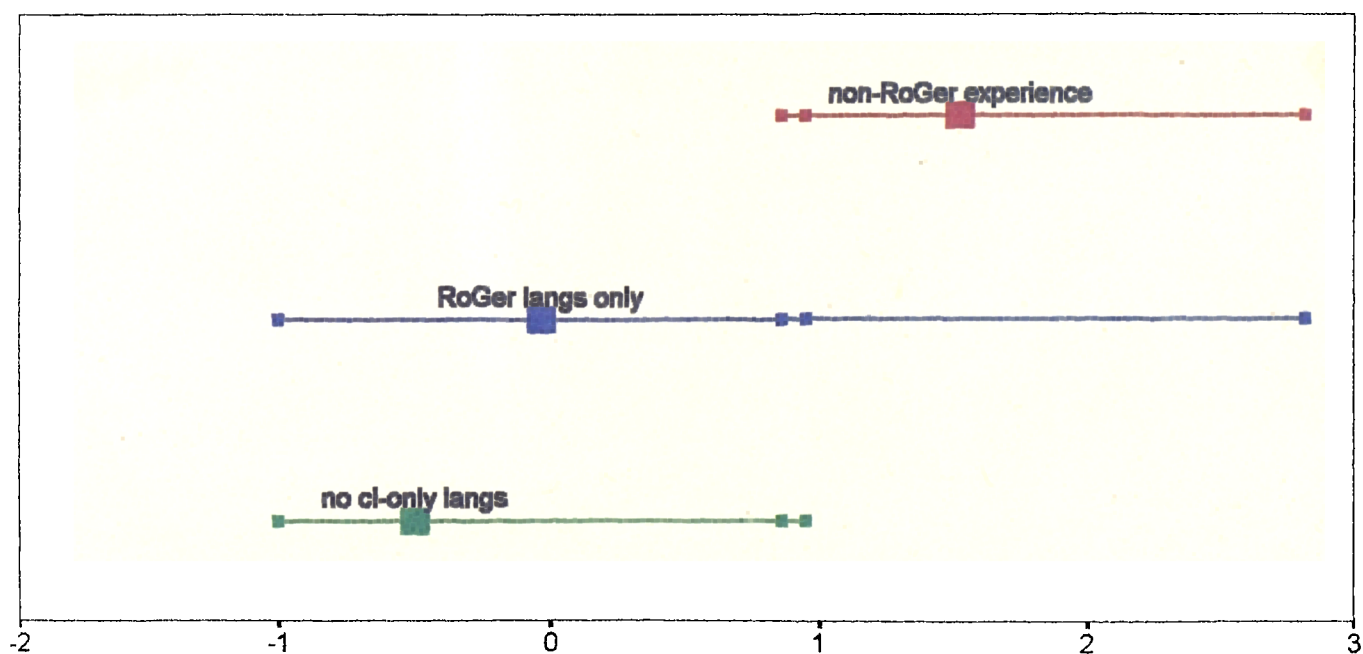


Function 1 : More writing, less strategies

large squares = means, small squares = individual cases

There is a slight link between *Class-Only Exotic Experience* and GROUPs, as shown by Function 1's weak canonical correlation of .46. Function 2, at a near-zero canonical correlation of .03, is ignored.

The Coefficient and Correlation Matrices show that Function 1 is made up of high *Mention* of *WRITING* (positive values) and low *Mention* of *STRATEGIES* (negative values) - hence its name of "More writing, less strategies".

As there is only one Function, the Function-Scores Graph has only a horizontal axis. It shows that learners with non-Romance/Germanic experience (red) score high on the Function (mean score 1.53) , mentioning *WRITING* more and *STRATEGIES* less. The no Class-Only languages (green: mean score -.50) scores low, i.e. mentioning *WRITING* less and *STRATEGIES* more. The Romance/Germanic only category is in between (mean score -.03), though closer to the no Class-Only languages category.

The Keyword test was also successful; results are shown in Table and Graph 5.4.5/ii below:

## Table 5.4.5/ii

### *Class-Only Exotic Experience*: Discriminant Analysis;
### Independent Variables:Keyword *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 59.88% | 40.12% |
| A2. Canonical correlation | .65 | .58 |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Using videos, hard learning | Writing, not memorisation & time |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *(COMPONENTS:) CourseVideo Mention* | .93 | .09 |
| *(LANG.-CONTRAST:) Learnability Quality* | -.72 | -.33 |
| *(WRITING:) Writing Mention* | .10 | .83 |
| *(STRATEGIES:) Memorisation Mention* | .49 | -.61 |
| *(EFFORT/PLANNING:) Time Mention* | -.36 | -.47 |

### Table 5.4.5/ii (continued)

| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | |
|---|---|---|
| | Function 1 | Function 2 |
| *(MULTIPLE:) Basis Mention* | .49 | - |
| *(COMPONENTS:) CourseVideo Mention* | .48 | - |
| *(EFFORT/PLANNING:) HardWork Quality* | -.40 | - |
| *(WRITING:) Writing Mention* | - | .64 |
| *(WRITING:) Writing Quality* | - | .54 |
| *(STRATEGIES:) Memorisation Mention* | .46 | -.47 |

**Graph 5.4.5/ii:** *Class-Only Exotic Experience* **(Keyword Functions)**



Function 1 : Using videos, hard learning

large squares = means, small squares = individual cases
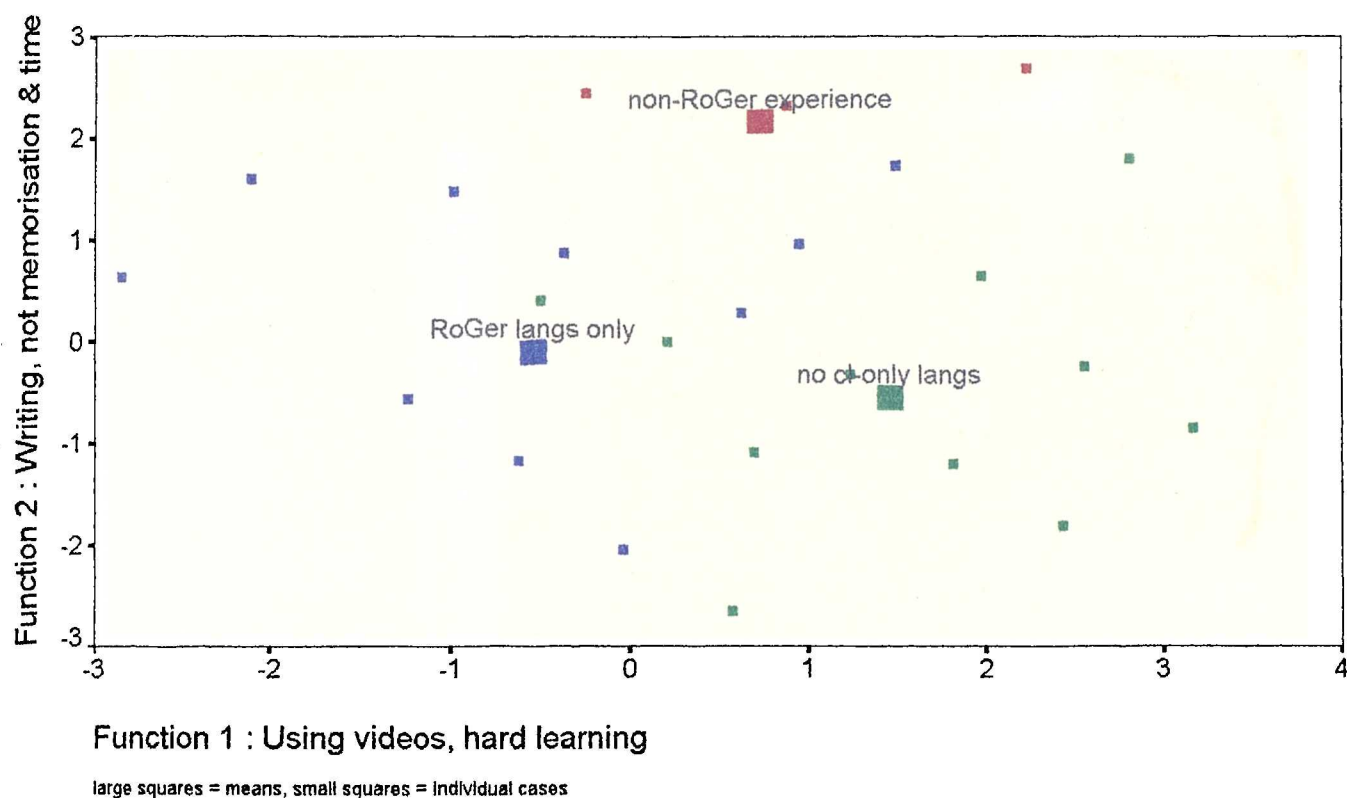
Here two moderately strong Discriminant Functions (canonical correlations .65 and .58 respectively) are generated, giving a more complex relationship between the three categories.

Looking first at Function 1, high scorers *Mention CourseVideo* more (strong coefficient .93; weak correlation .48), and some of them have *Learnability* problems (moderately strong coefficient: -.72, but no meaningful correlation); they also mention one means, etc. as a *Basis* for another and find *HardWork* more problematic (weak correlations .49, -.40). The name for Function 1 - "Using videos, hard learning" - expresses most of these influences.

As for Function 2, the key players are high *Mention* of self-directed *Writing* (strong coefficient .83, moderately strong correlation .64) and low *Mention* of *Memorisation* (moderate coefficient .61, weak correlation -.47). A less important sub-group tends not to *Mention* the finding-*Time* issue (weakish coefficient -.47); also, as *Writing* gets overwhelmingly helpful ratings (Table 5.4.4/i), more *Writing Mentions* imply better *Writing Quality* (.54 correlation). Hence the Function was titled "Writing, not memorisation and time".

The Graph shows that when the Class-Only Romance/Germanic only learners (blue) talk about their Self-Directed experience, they mention *CourseVideos* and *Writing* less, *Memorisation* and *Time* more, and find their Self-Directed languages easy to learn (low scores on both Functions). Those with Class-Only non-Romance/Germanic experience (red) have more awareness of *Writing*, but mention *Memorisation* and the *Time* issue less (high scores on Function 2, neutral on Function 1). Those with no Class-Only languages (green) - i.e. those with a Self-Directed element to all their languages - mention *CourseVideo*, *Memorisation*, *Time* and *Basis* more, *Writing* relatively little, and have *Learnability* and *HardWork* problems (high scores on Function 1, low scores on Function 2).

### 5.4.5.b.ii *Class-Only Language Count*

A Discriminant Analysis comparing this Learner-Profile variable against the GROUP variables failed to come up with a canonical correlation above the .40 threshold. The Keywords Analysis, by contrast, was successful. Results are shown in Table and Graph 5.4.5/iii below:

**Table 5.4.5/iii**

*Class-Only Language Count*: Discriminant Analysis;

Independent Variables: Keyword *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 77.95% | 22.05% |
| A2. Canonical correlation | .63 | .39 |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Memorising, video, learnability problems | - |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *(COMPONENTS:) CourseVideo Mention* | .81 | - |
| *(STRATEGIES:) Memorisation Mention* | .71 | - |
| *(LANG.-CONTRAST:) Learnability Quality* | -.56 | - |
| *(PEOPLE:) StudyBuddy Quality* | .05 | - |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| *(STRATEGIES:) Memorisation Mention* | .63 | - |
| *(MULTIPLE:) Basis Mention* | .52 | - |
| *(COMPONENTS:) CourseVideo Mention* | .46 | - |
| *(MULTIPLE:) Basis Quality* | .43 | - |
| *(EFFORT/PLANNING:) HardWork Quality* | -.43 | - |

**Graph 5.4.5/iii:** *Class-Only Language Count* **(Keyword Functions)**
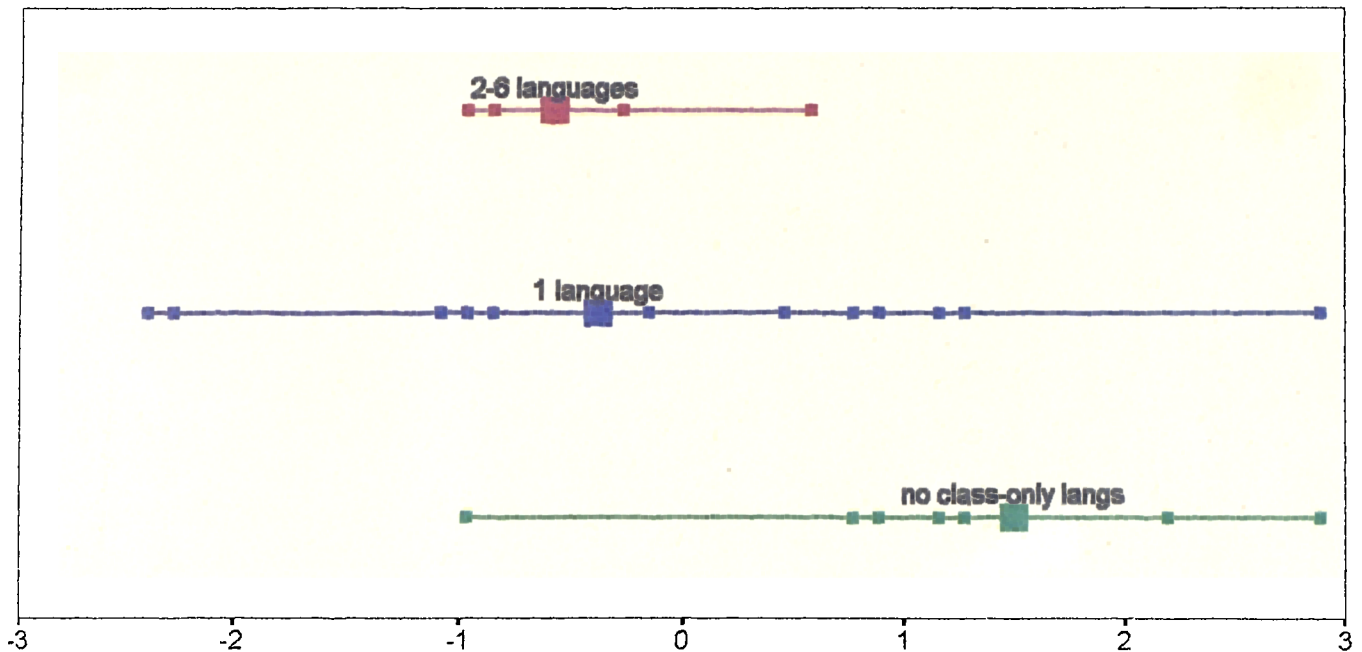


Function 1 : Memorising, videos, learnability problems

large squares = means, small squares = individual cases

There is a moderately strong link between *Class-Only Language Count* and Keywords, shown by Function 1's canonical correlation of .63. As Function 2 falls below the .40 canonical correlation threshold (albeit only just: .39), it will be ignored.

Function 1 was titled "Memorising, video, learnability problems". It combines *Mentions* of *Memorisation* (strongish coefficient and correlation: .71, .63) and of published *Course-Videos* (strong coefficient, weak correlation: .81, .46), plus a sub-group with language *Learnability* problems (moderate coefficient only: -.56). This also weakly implies (Correlation Matrix) more *Mentions* and good *Quality* ratings of the *Basis* Keyword - i.e. one means or course as a basis for further learning - but a dislike of the *HardWork* that language learning entails.

The Graph indicates that the high scorers on the Function are the all-Self-Directed no Class-Only languages group (green); there is little difference between the Class-Only

experience categories (1 language and 2-6 languages: blue and red respectively), which both score low. In other words, having Self-Directed experience in all one's languages gives more awareness of memorisation and multiple-means (*Basis*) strategies and of course videos, but a tendency to find one's languages difficult and strenuous to learn. Conversely, having Class-Only experience in at least one language gives less mention of the two strategies and the videos, but a tendency to find one's Self-Directed languages easy to learn.

### 5.4.5.b.iii *Class-Only Maximum Command*

A Discriminant Analysis comparing this Learner-Profile variable against the GROUP variables failed outright. The Keywords Analysis, by contrast, was successful; results are shown in Table and Graph 5.4.5/iv below:

### Table 5.4.5/iv

*Class-Only Maximum Command*: Discriminant Analysis;

Independent Variables: Keyword *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | | |
|---|---|---|---|
| | Function 1 | Funct 2 | Funct 3 |
| A1. %age of dataset variance accounted for | 83.20% | 10.62% | 6.18% |
| A2. Canonical correlation | .64 | .28 | .22 |
| **B. MAKEUP OF FUNCTIONS** | | | |
| **B1. Suggested Names** | | | |
| | Function 1 | Funct 2 | Funct 3 |
| | Memorising, videos, not transfer | - | - |
| B2. Key-Variable:Function Coefficient Matrix | | | |
| | Function 1 | Funct 2 | Funct 3 |
| *(STRATEGIES:) Memorisation Mention* | .88 | - | - |
| *(COMPONENTS:) CourseVideo Mention* | .58 | * | - |
| *(LANG.-CONTRAST:) Transfer Mention* | -.50 | * | - |
| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | | |
| | Function 1 | Funct 2 | Funct 3 |
| *(STRATEGIES:) Memorisation Mention* | .70 | - | - |
| *(MULTIPLE:) Basis Mention* | .40 | - | - |
| *(COMPONENTS:) CourseVideo Mention* | .40 | * | - |

**Graph 5.4.5/iv:** *Class-Only Maximum Command* **(Keyword Functions)**
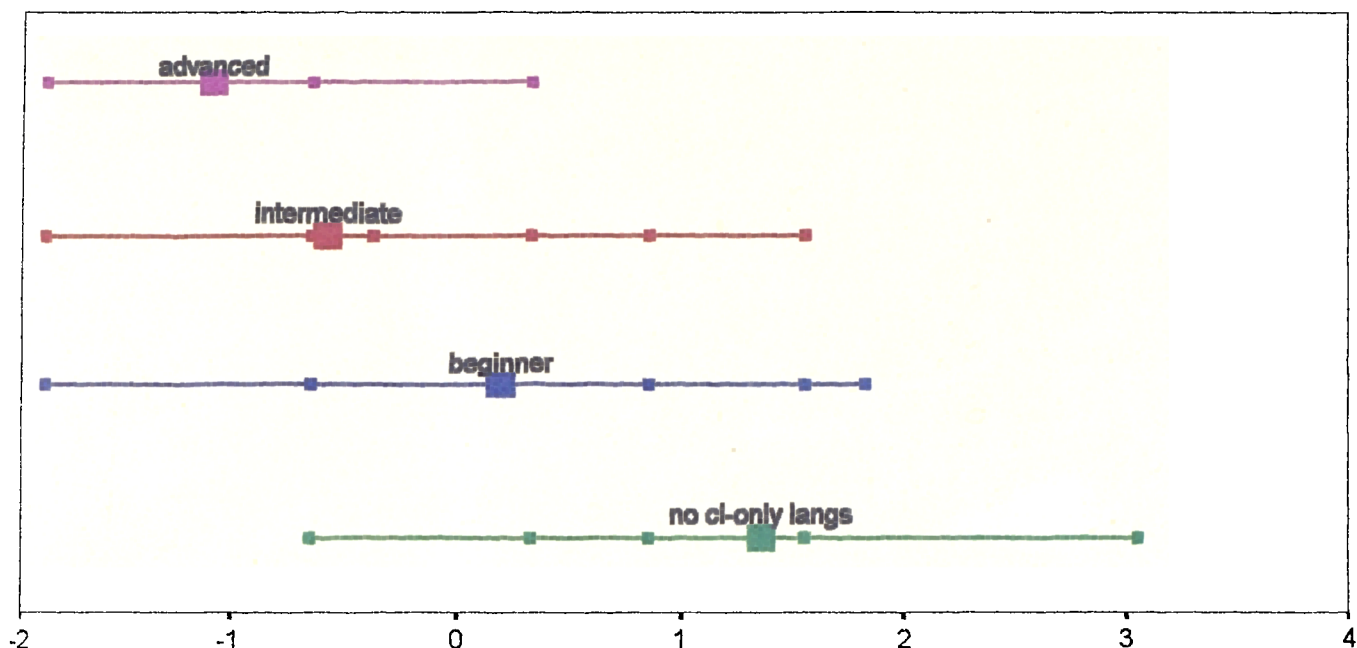


Function 1 : Memorising, videos, not transfer

large squares = means, small squares = individual cases

Here three Functions are generated; fortunately, only one comes over the .40 canonical correlation mark - Function 1. At a canonical correlation of .64, it shows a moderately strong link between *Class-Only Maximum Command* and Keywords.

Function 1's main component is *Mention* of *Memorisation* (strong coefficient and correlation: .88, .70. Though high *Mention* of *CourseVideos* (moderate coefficient, weak correlation: .58, .40) and low *Mention* of *Transfer* (moderate coefficient -.50 only) relate more to the discarded Function 2 (unhighlighted), they do play supporting roles here. This cluster also weakly implies *Mention* of one means, etc. forming a *Basis* for another (correlation only: .40). The Function was named "Memorising, videos, not transfer" as a result.

The Graph shows high scorers to be the Self-Directed-only no Class-Only languages group (green). As the command of one's most proficient Class-Only language increases - beginner (blue) ⇨ intermediate (red) ⇨ advanced (pink) - scores on the Function gradually fall. In other words, no Class-Only experience (i.e. all languages Self-Directed), as in the previous Discriminant Analyses, seems linked to increased awareness of memorisation, plus course videos and an awareness of the importance of different learning stages (*Basis*). Increasing command of Class-Only languages, by contrast, gives decreasing mention of these items, but slightly increasing awareness of language transfer factors.

### 5.4.5.b.iv *Total Language Count*

A Discriminant Analysis test comparing *Total Language Count* against GROUPs was successful. Results are shown in Table and Graph 5.4.5/v below:

### Table 5.4.5/v

*Total Language Count*: Discriminant Analysis;

Independent Variables: GROUP *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 80.80% | 19.20% |
| A2. Canonical correlation | .60 | .34 |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Listening problems, writing unawareness | - |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| LISTENING *Quality* | -.82 | - |
| WRITING *Mention* | -.69 | - |
| READING *Quality* | -.27 | - |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| LISTENING *Quality* | -.73 | - |
| WRITING *Mention* | -.45 | - |
| READING *Mention* | -.42 | - |

**Graph 5.4.5/v:** *Total Language Count* **(GROUP Functions)**
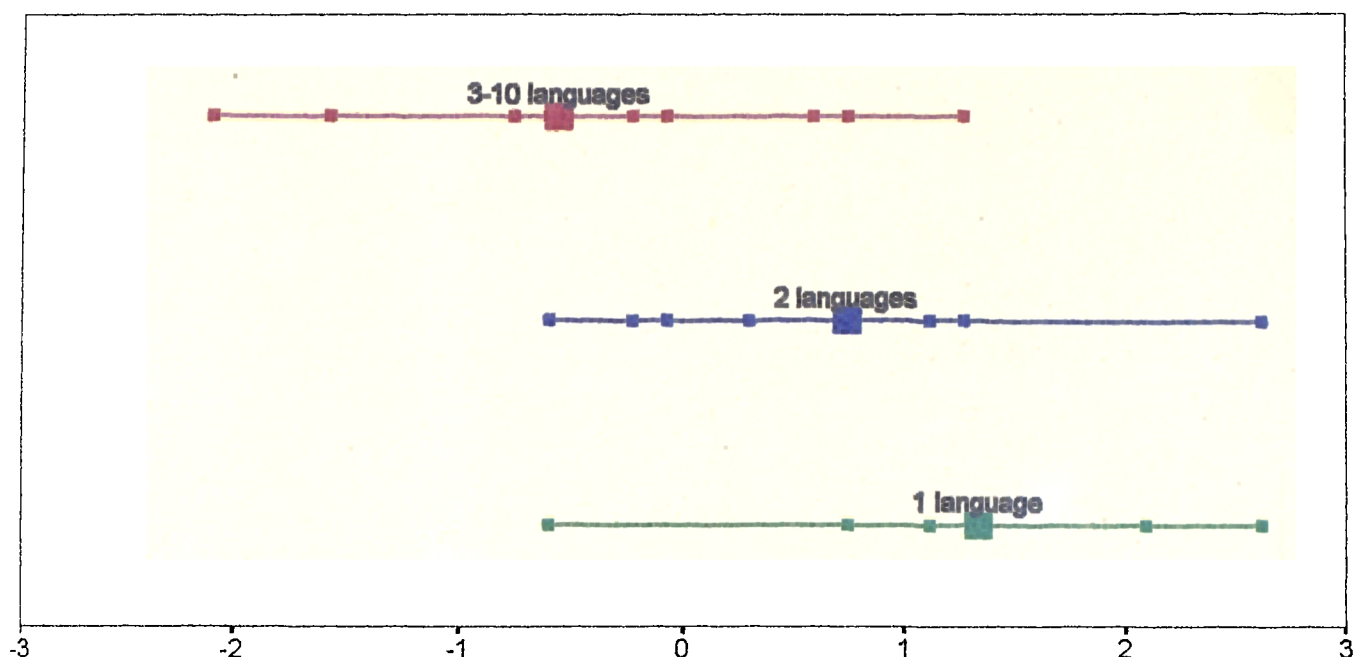


Function 1 : Listening problems, writing unawareness

large squares = means, small squares = individual cases

Only one Function came over the .40 canonical correlation threshold: Function 1, at .60. Thus *Total Language Count* is moderately strongly linked to GROUP tags.

Function 1's main ingredient is problems with *LISTENING* skills (strong coefficient and correlation: -.82, -.73), backed up by low *Mention* of *WRITING* skills (moderate coefficient, weak correlation: -.69, -.45) - hence its name of "Listening problems, writing unawareness". Though *READING Quality* and *Mention* (unhighlighted) relate more to the disregarded Function 2, their ratings on Function 1 confirm the low-mention and poor-quality skills picture of the other two variables.

The Graph shows that, as one's *Total Language Count* increases - 1 language (green) ⇨ 2 languages (blue) ⇨ 3-10 languages (red) - so the mean score on the Function decreases, though individual-learner scores have a fair degree of overlap. Thus learners with few languages overall tend to express listening problems and not mention writing,

whereas more polyglot learners tend to have good listening experiences and mention writing.

The **Keyword** test was also successful. Results are shown in Table and Graph 5.4.5/vi below:

**Table 5.4.5/vi**

*Total Language Count*: **Discriminant Analysis;**

**Independent Variables: Keyword *Mention* and *Quality***

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 84.94% | 15.06% |
| A2. Canonical correlation | .91 | .68 |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Oral concerns, no country | (untitled) |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *(LISTEN'G/READ'G:) Understanding Quality* | -1.48 | -.28 |
| *(LISTEN'G/READ'G:) Understanding Mention* | 1.21 | .99 |
| *(COMPONENTS:) CourseVideo Mention* | 1.10 | -.15 |
| *(SPEAKING:) Speaking Mention* | .86 | -.09 |
| *(PEOPLE:) Country Mention* | -.83 | .21 |
| *(LISTENING:) Listening Quality* | -.60 | -.01 |
| *(GRAMMAR:) Grammar Mention* | .51 | -.05 |
| *(EFFORT/PLANNING:) HardWork Mention* | -.51 | .44 |
| *(SPEAKING:) Pronunciation Mention* | -.44 | -.03 |
| *(SPEAKING:) Speaking Quality* | -.19 | -.82 |
| *(PEOPLE:) NativeSpeaker Mention* | -.15 | .65 |
| *(SPEAKING:) Pronunciation Quality* | -.34 | .60 |
| *(WRITING:) Writing Mention* | -.41 | .53 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| *(PEOPLE:) NativeSpeaker Mention* | -.11 | .47 |

**Graph 5.4.5/vi: *Total Language Count* (Keyword Functions)**



Function 1 : Oral concerns, no country

large squares = means, small squares = individual cases
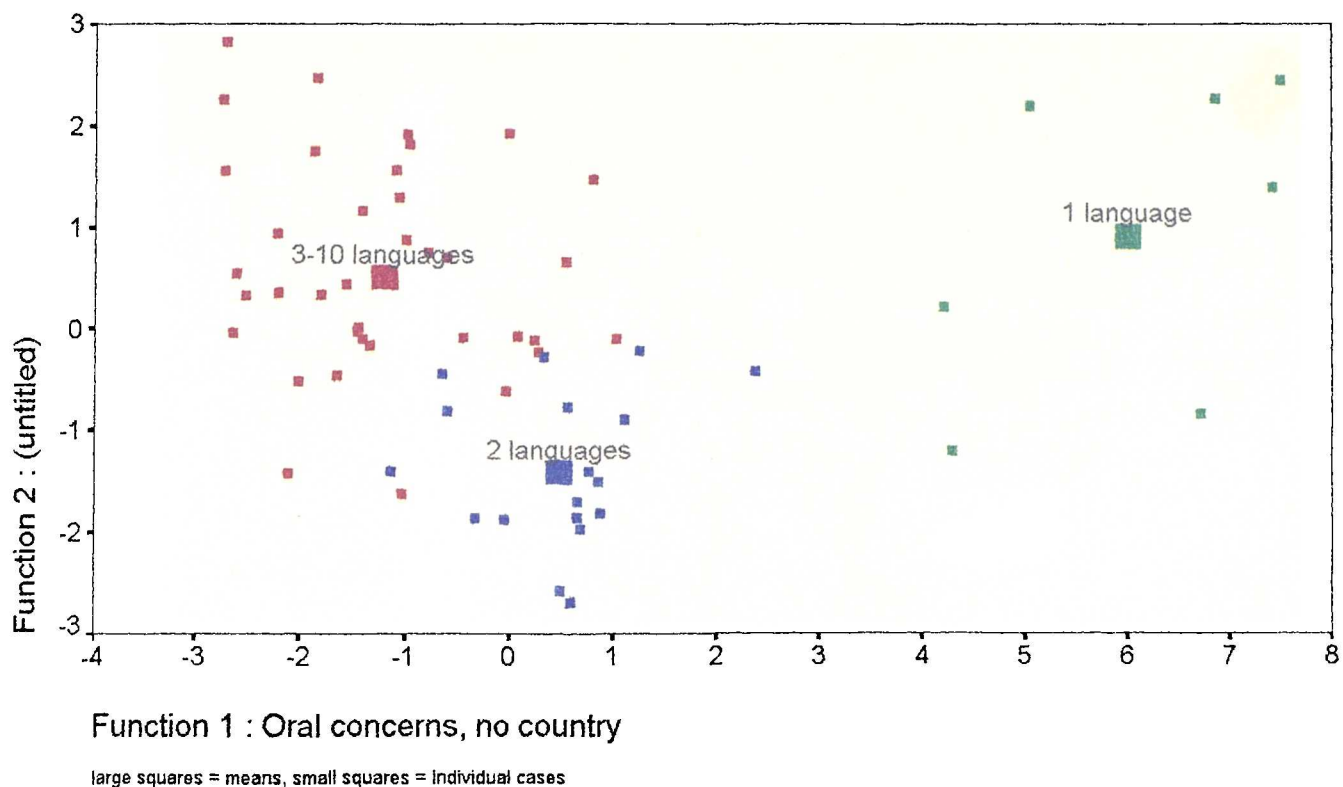
Both Discriminant Functions come over the .40 mark: Function 1 has a near-perfect canonical correlation of .91, and Function 2 has a moderately strong .68. In other words, *Total Language Count* is very strongly linked to the Keyword data.

Function 1's high discriminatory power, however, is achieved by a large number of alternative features (Coefficient Matrix), none of which is strongly linked in isolation to *Total Language Count* (Correlation Matrix). Most of them are *Mention* variables, reflecting an unsurprising tendency for learners with more experience to have more to say. The main themes are a preoccupation with *Understanding* and its problems (*Quality* -1.48, *Mention* 1.21), and general *Listening* difficulty *(Quality* -.60). There is more *Mention* of published *Course-Videos* (1.10) and *Speaking* practice (.86), but less of the L2 *Country* (-.83). Over-*Mention* of *Grammar* and under-*Mention* of *HardWork*

and *Pronunciation* are minor additions. Function 1's title summarises the main influences: "Oral concerns, no country".

Function 2 is more difficult to define, and hence remained untitled: *Mention* of *Understanding*, *Writing* and *NativeSpeakers*, poor *Speaking* and good *Pronunciation Quality* make uneasy bedfellows.

The Graph shows that Function 1 sorts the three *Total Language Count* categories in a linear fashion: from left to right, 3-10 languages (red) ⇨ 2 languages (blue) ⇨ 1 language (green). The 1 language category, however, is clearly separate, whereas the 2 and 3-10 languages categories overlap to a great extent.

As for Function 2, it appears to sort out what is special about the 2 languages category (low-scoring) as compared to the other categories (high-scoring). Neither intuition nor previous research leads one to believe there should be anything special about a 2-languages category; coupled with the fact that its component variables are rather inconsistent, Function 2 is probably best regarded as a sampling artefact.

We may conclude, therefore, that learners with only one foreign language show more awareness of, and problems with, oral skills and understanding generally. Those with more languages have fewer problems and less preoccupation with listening and understanding, but mention the L2 country more.

### 5.4.5.c Factor 2: Self-Instructed Experience

The main variables here were, in order of correlation strength: *Solo/Mixed Language Count*, *Solo/Mixed Exotic Experience*, and *Total Language Count*. *Total Language Count* has already been looked at in the previous sub-section.

#### 5.4.5.c.i *Solo/Mixed Language Count*

The results of the GROUP Discriminant Analysis are shown in Table and Graph 5.4.5/vii below:

Table 5.4.5/vii

*Solo/Mixed Language Count*: Discriminant Analysis;

Independent Variables: GROUP *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 93.40% | 6.60% |
| A2. Canonical correlation | .63 | .21 |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Writing, practice, good listening | - |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *WRITING Mention* | .66 | - |
| *PRACTICE Mention* | .59 | - |
| *LISTENING Quality* | .53 | - |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| *PRACTICE Mention* | .66 | - |
| *WRITING Mention* | .55 | - |
| *LISTENING Quality* | .47 | - |
| *COMPONENTS Quality* | .43 | - |

**Graph 5.4.5/vii:** *Solo/Mixed Language Count* **(GROUP Functions)**
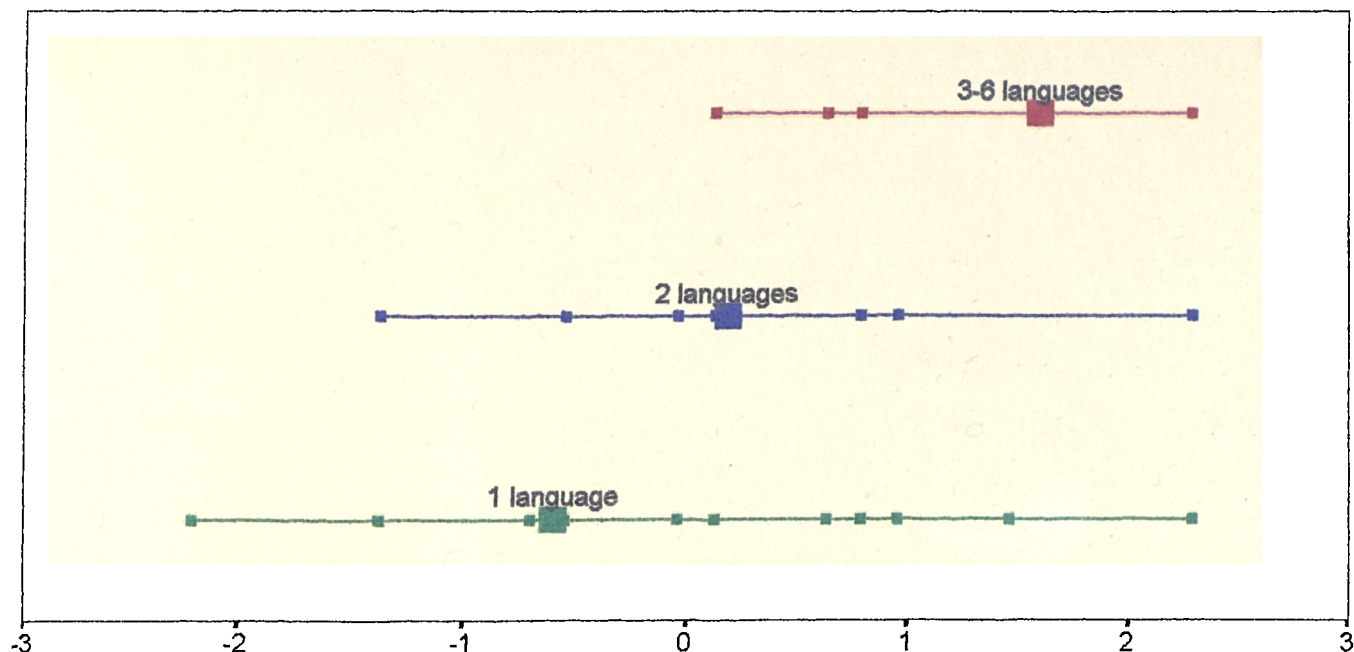


Function 1: Writing, practice, good listening

large squares = means, small squares = individual cases

Only one Function came over the .40 canonical correlation threshold: Function 1, at .63. Thus *Self-Directed Language Count* is moderately strongly linked to GROUP tags.

Function 1 is made up mainly of *Mention* of *WRITING* and of *PRACTICE* (moderately strong coefficients and correlations). Though good *LISTENING Quality* relates more to the discarded Function 2, it also loads moderately on Function 1 (coefficient .53, correlation .47) - hence Function 1's name of "Writing, practice, good listening". This cluster also implies (weak correlation: .43) good experience with package *COMPONENTS* (cassettes, videos, etc.). It was named "Writing, practice, good listening".

The Graph shows that increasing scores on Function 1 are linked to increasing *Solo/Mixed Language Count*: 1 language (green) ⇨ 2 languages (blue) ⇨ 3-6

languages (red). In other words, the wider experience one's self-instructed experience in language-count terms, the more one's awareness of writing and of issues connected with practice, and the better one's listening experiences.

The *Solo/Mixed Language Count* Keywords test was also successful; results are shown in Table & Graph 5.4.5/viii below:

Table 5.4.5/viii

*Solo/Mixed Language Count*: Discriminant Analysis;

Independent Variables: Keyword *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 88.44% | 11.56% |
| A2. Canonical correlation | .78 | .41[67] |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Various issues | - |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *(LISTENING:) RecordedText Quality* | .82 | - |
| *(STRATEGIES:) Memorisation Quality* | -.71 | - |
| *(VOCABULARY:) Vocabulary Mention* | .67 | - |
| *(MOTIVATORS:) Confidence Quality* | .58 | - |
| *(PUBLISHERS:) Bbc Mention* | .54 | - |
| *(LANG.-CONTRAST:) Learnability Mention* | .54 | - |
| *(MOTIVATORS:) Motivation Mention* | .48 | - |
| *(ASSESSMENT:) Progress Mention* | .39 | - |
| **B3. Independent-Variable:Function Correlation Matrix (correlations $\geq$.40 only)** | | |
| | Function 1 | Function 2 |
| (no variables qualify) | | |

---

[67] Not significant: p .11 (chi-square 11.86 @ 7 d.f.).

**Graph 5.4.5/viii:** *Solo/Mixed Language Count* **(Keyword Functions)**
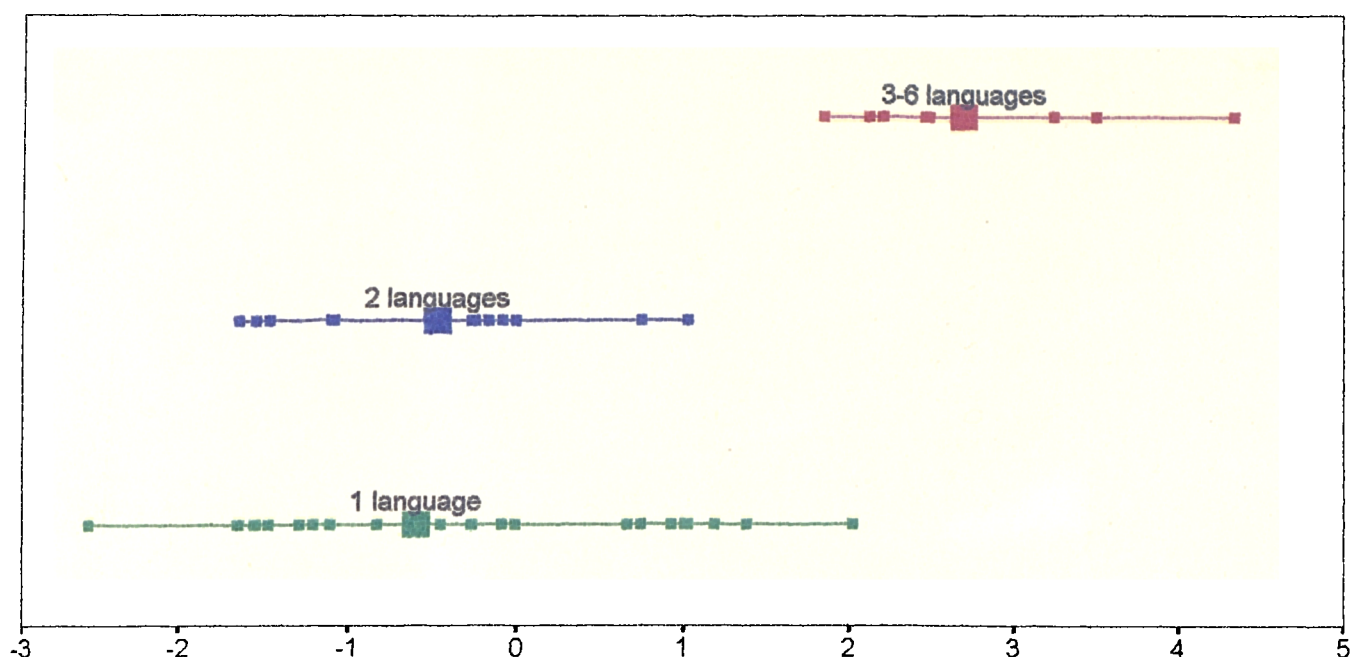


Function 1: Various issues

large squares = means, small squares = individual cases

Though both Functions came over the .40 canonical correlation threshold, only Function 1 was statistically significant; thus Function 2 will be ignored. Function 1's canonical correlation of .78 shows that *Solo/Mixed Language Count* is strongly linked to Keywords.

Function 1 is a large, mixed bag of variables, with none salient (none correlate meaningfully with the Function): hence the Function's name - "Various issues". Good *RecordedText Quality* echoes the good *LISTENING* experiences in the GROUPs test above. Other variables loading on Function 1 are awareness of *Vocabulary* and *Learnability* issues and good self- *Confidence*. *Bbc* courses are also widely mentioned.

The Graph shows that increasing scores on Function 1 are linked to increasing *Solo/Mixed Language Count*. Rather than a 3-step gradation, however, here there is a

clear two-way division between 1 and 2 languages on the one hand (green and blue respectively) and 3-6 languages (red) on the other. In other words, increasing language experience does seem to be linked to a bundle of awarenesses and good experiences, but with little clear pattern or progression.

### 5.4.5.c.ii Solo/Mixed Exotic Experience

The results of the GROUP Discriminant Analysis are shown in Table and Graph 5.4.5/ix below:

**Table 5.4.5/ix**

*Solo/Mixed Exotic Experience*: **Discriminant Analysis;**

**Independent Variables: GROUP** *Mention* **and** *Quality*

| A. DISCRIMINATORY POWER OF FUNCTION | |
|---|---|
| | Function 1 |
| A1. %age of dataset variance accounted for | 100.00% |
| A2. Canonical correlation | .65 |
| **B. MAKEUP OF FUNCTION** | |
| **B1. Suggested Name** | |
| | Function 1 |
| | Writing, drive, poor materials |
| **B2. Key-Variable:Function Coefficient Matrix** | |
| | Function 1 |
| *WRITING Mention* | .94 |
| *EFFORT/PLANNING Quality* | .41 |
| *USABILITY Quality* | -.41 |
| *MOTIVATORS Mention* | .40 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | |
| | Function 1 |
| *WRITING Mention* | .75 |

**Graph 5.4.5/ix:** *Solo/Mixed Exotic Experience* **(GROUP Functions)**
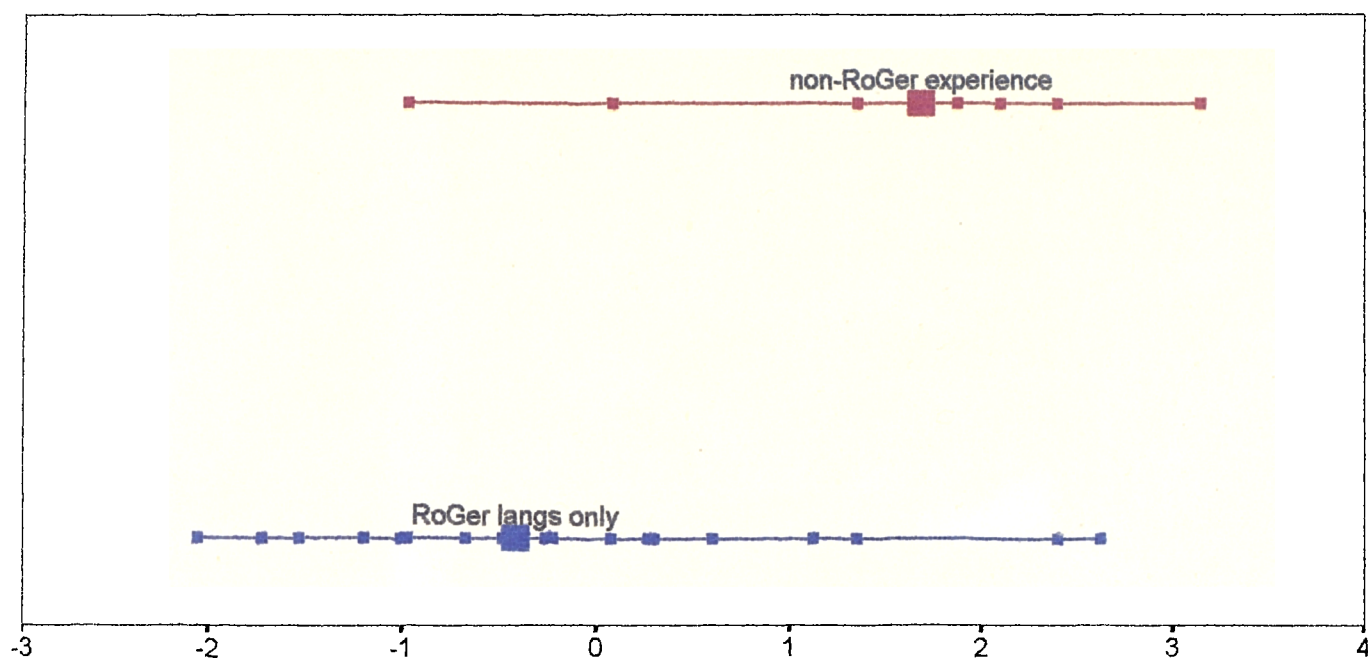


**Function 1: Writing, drive, poor materials**

large squares = means, small squares = individual cases

A single Discriminant Function was generated. At a canonical correlation of .65, it shows a moderately strong linkage between *Solo/Mixed Exotic Experience* and GROUP tags.

The Coefficients and Correlation Matrices show that *Mention* of *WRITING* skills is the key component of the Function (very strong positive values). Some learners *Mention MOTIVATORS*, some cite good *EFFORT/PLANNING* strategies and poor materials *USABILITY* is a problem for some (weak coefficients, no correlations). The Function was titled "Writing, drive, poor materials".

The Graph shows that increasing scores on the Function are linked to increasing probability of non-Romance/Germanic experience (red). In other words, self-instructed experience in "exotic" languages (many of which have non-Latin scripts) is linked

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primarily to awareness of the writing issue. It may also be linked to good self-discipline, effort and planning skills, and materials may be poor. Experience in Romance/ Germanic languages only (blue), by contrast, is linked to under-mention of writing; some may see themselves as having poor effort and planning skills, though the materials available may be better designed.

The results of the Keyword Discriminant Analysis are shown in Table & Graph 5.4.5/x below:

<center>

Table 5.4.5/x:

*Solo/Mixed Exotic Experience* Discriminant Analysis;

Independent Variables: Keyword *Mention* and *Quality*

</center>

| A. DISCRIMINATORY POWER OF FUNCTIONS | |
|---|---|
| | Function 1 |
| A1. %age of dataset variance accounted for | 100.00% |
| A2. Canonical correlation | .90 |
| **B. MAKEUP OF FUNCTIONS** | |
| **B1. Suggested Names** | |
| | Function 1 |
| | Writing, etc. |
| **B2. Key-Variable:Function Coefficient Matrix** | |
| | Function 1 |
| *(WRITING:) Writing Mention* | 1.24 |
| *(STRATEGIES:) Repetition Mention* | .93 |
| *(EFFORT/PLANNING:) HardWork Mention* | .86 |
| *(SPEAKING:) Speaking Quality* | -.84 |
| *(SPEAKING:) Pronunciation Mention* | .76 |
| *(EFFORT/PLANNING:) HardWork Quality* | .73 |
| *(CLASSWORK:) Class Mention* | .64 |
| *(ASSESSMENT:) Assessment/Feedback Quality* | .63 |
| *(STRATEGIES:) Inductive Mention* | -.63 |
| *(MULTIPLE:) Basis Mention* | -.62 |
| *(LANGUAGE-CONTRAST:) Learnability Quality* | -.56 |
| *(STRATEGIES:) Inductive Quality* | .50 |
| *(ENJOYABILITY:) Variety Quality* | -.48 |
| *(VOCABULARY:) Vocabulary Quality* | .41 |
| *(PRACTICE:) Controlled Mention* | -.39 |
| *(STRATEGIES:) Notetaking Mention* | -.29 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | |
| | Function 1 |
| (no variables qualify) | |

**Graph 5.4.5/x:** *Solo/Mixed Exotic Experience* **(Keyword Functions)**
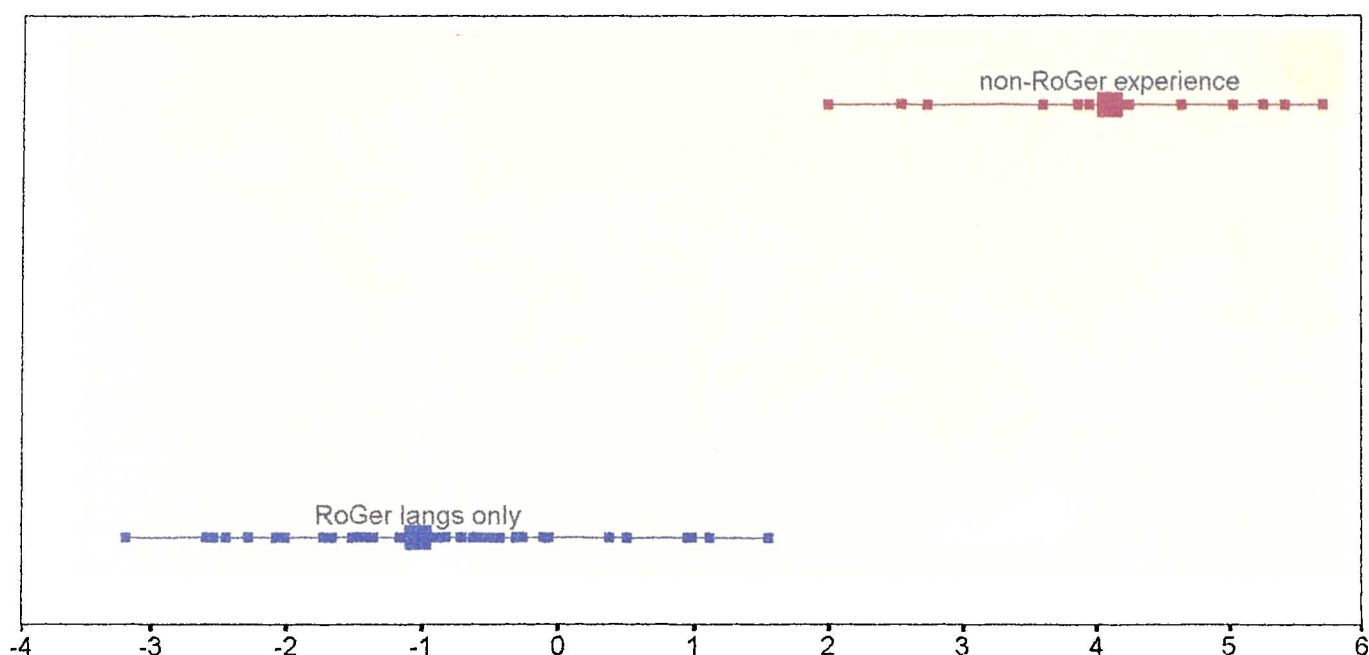


Function 1: Writing, etc.

large squares = means, small squares = individual cases

A single Discriminant Function was generated. At a canonical correlation of .90, it shows a near-perfect linkage between *Solo/Mixed Exotic Experience* and Keywords; this is underlined by the total separation of the two categories on the Graph.

This discriminatory power, however, is achieved by adding together no less than 16 Key Variables with largely non-overlapping effects (no meaningful correlations); nor do they seem to fall into any coherent pattern. *Mention* of *Writing* (very strong coefficient: 1.24) is the only really salient variable: therefore the Function was titled "Writing, etc.".

The Graph shows that increasing scores on the Function are linked to increasing probability of <u>non-Romance/Germanic experience</u> (red). In other words, self-instructed experience in "exotic" languages is again linked, inter alia, to increased awareness of writing.

## 5.4.5.d Factor 3: Learning-Means Effects

The main variables here were, in order of correlation strength: *Solo/Mixed Initial Learning-Means Profile*, *Solo/Mixed Failure Profile*, *Solo/Mixed Maximum Command*, and *Solo/Mixed Dropout Profile*.

### 5.4.5.d.i *Solo/Mixed Initial Learning-Means Profile*

The results of the GROUP Discriminant Analysis are shown in Table and Graph 5.4.5/xi below:

### Table 5.4.5/xi

*Solo/Mixed Initial Learning-Means Profile*: Discriminant Analysis;

Independent Variables: GROUP *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 61.02% | 38.98% |
| A2. Canonical correlation | .56 | .48 |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Package nous, vocab problems | Practice mention |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| VOCABULARY *Quality* | -.68 | .49 |
| PACING *Quality* | .67 | .16 |
| COMPONENTS *Mention* | .65 | -.11 |
| PRACTICE *Mention* | .25 | .91 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥ .40 only)** | | |
| | Function 1 | Function 2 |
| COMPONENTS *Mention* | .50 | - |
| PACING *Mention* | .48 | - |
| PACING *Quality* | .48 | - |
| PRACTICE *Mention* | - | .85 |
| PRACTICE *Quality* | - | .54 |
| VOCABULARY *Quality* | -.44 | .49 |
| VOCABULARY *Mention* | - | .41 |

**Graph 5.4.5/xi: Solo/Mixed Initial Learning-Means Profile (GROUP Functions)**
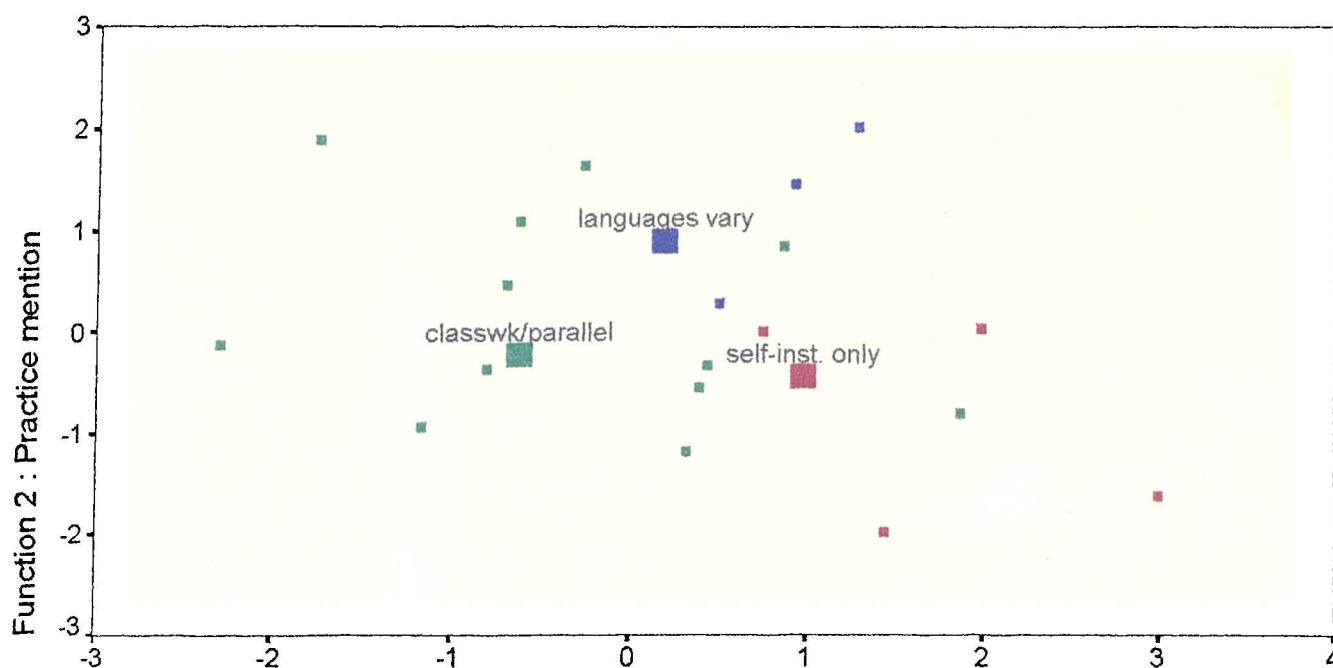


Function 1 : Package nous, vocab problems

large squares = means, small squares = individual cases

Both Discriminant Functions come over the .40 canonical correlation mark: Function 1 at a moderate .56, and Function 2 at a weak .48. In other words, *Solo/Mixed Initial Learning-Means Profile* is moderately linked to the GROUP data.

The Coefficient Matrix shows Function 1 to be composed of: *VOCABULARY* problems (*Quality* -.68), ability to cope with materials input *PACING* (*Quality* .67), and *Mention* of published course *COMPONENTS* (.65). The Correlation Matrix adds the fact that, with *PACING*, good *Quality* implies high *Mention* (correlation .48). Putting *COMPONENTS* and *PACING* together as two learning-package related skills, Function 1 was titled "Package nous, vocab problems".

The main element of Function 2 is *Mention* of materials *PRACTICE* features (coefficient .91, correlation .85), though this implies, inter alia, good *VOCABULARY* experiences (correlation only: .49). It was titled "Practice mention".

The Graph shows a three-way relationship between the three Solo/Mixed learning means sub-categories[68]. Those starting learning with all languages self-instruction-only (red: high scores on Function 1, low scores on Function 2) have good package-handling skills/awareness, but vocabulary problems and less awareness of practice features. Those starting (Mixed-Means) learning projects with all languages classwork/parallel (green: low scores on both Functions) have less "package nous", including less awareness of practice features, but have more positive vocabulary-learning experiences. Those whose initial Solo/Mixed learning means vary (blue: high on Function 2, neutral on Function 1) tend to mention practice more[69].

The results of the Keyword Analysis are shown in Table & Graph 5.4.5/xii below:

### Table 5.4.5/xii

*Solo/Mixed Initial Learning-Means Profile*: Discriminant Analysis;

**Independent Variables: Keyword *Mention* and *Quality***

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 66.90% | 33.10% |
| A2. Canonical correlation | .58 | .45 |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | Vocabulary problems, routines | Cassettes & motivation |

---

[68] I.e. leaving aside the Class-Only-throughout languages, which have already been discussed in Section 5.4.5.b.

[69] As the likelihood of the languages vary category increases with language-count, there may be a partial language-count effect here.

**Table 5.4.5/xii (continued)**

| B2. Key-Variable:Function Coefficient Matrix | | |
|---|---|---|
| | Function 1 | Function 2 |
| *(VOCABULARY:) Vocabulary Quality* | -.90 | -.12 |
| *(EFFORT/PLANNING:) Routine Mention* | .69 | .18 |
| *(COMPONENTS:) CourseCassette Mention* | .12 | .77 |
| *(MOTIVATORS:) Motivation Mention* | -.50 | .64 |
| **B3. Independent-Variable:Function Correlation Matrix** (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| *(VOCABULARY:) Vocabulary Quality* | -.70 | - |
| *(EFFORT/PLANNING:) Routine Mention* | .41 | - |
| *(COMPONENTS:) CourseCassette Mention* | - | .68 |
| *(MOTIVATORS:) Motivation Mention* | - | .65 |

**Graph 5.4.5/xii: Solo/Mixed Initial Learning-Means Profile (Keyword Functions)**
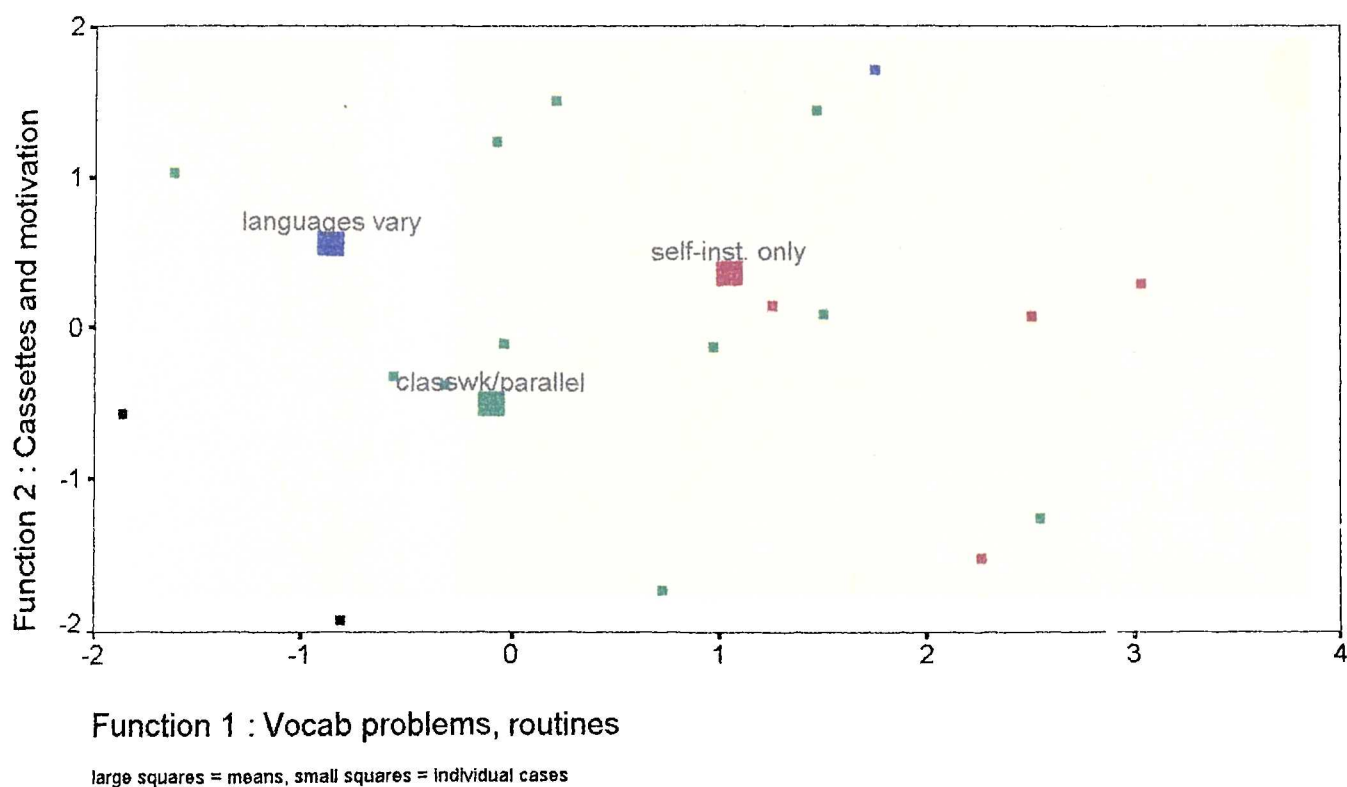


Function 1 : Vocab problems, routines

large squares = means, small squares = individual cases

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Both Discriminant Functions come over the .40 canonical correlation mark: Function 1 at a moderate .58, and Function 2 at a weak .45. In other words, *Solo/Mixed Initial Learning-Means Profile* is moderately linked to the Keyword data.

According to the Coefficients and Correlation Matrices, Function 1's main elements are: *Vocabulary* problems (strong negative *Quality* values), plus *Mention* of work-*Routine* setting (moderate positive values). The Function was titled "Vocabulary problems, routines".

The Coefficients and Correlation Matrices show Function 2's main elements to be *Mention* of published *CourseCassettes* and of *Motivation* (positive values), earning it the name "Cassettes & motivation".

The Graph again shows a three-way relationship between the three Solo/Mixed learning means sub-categories. Those starting learning with all languages self-instruction-only (red: high scores on Function 1, high-ish on Function 2) tend to mention package cassettes, motivation and routine-setting more, but again have vocabulary problems. Those starting (Mixed-Means) learning projects with all languages classwork/parallel (green: low on Function 2, neutral on Function 1) mention package cassettes and motivation less. Those whose initial Solo/Mixed learning means vary (blue: low on Function 1, high on Function 2) tend to mention package cassettes and motivation more and routine-setting less, and to have better vocabulary experiences[70]. There is a lot of overlap between the categories, however, especially on the Function 2 axis (this overlap is also expressed by Function 2's weak canonical correlation); hence perhaps not too much should be made of the "Cassettes and motivation" dimension.

### 5.4.5.d.ii *Solo/Mixed Failure Profile*

The results of the GROUP Discriminant Analysis are shown in Table and Graph 5.4.5/xiii below:

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[70] As the likelihood of the languages vary category increases with language-count, there may be a partial language-count effect here.

Table 5.4.5/xiii

*Solo/Mixed Failure Profile*: Discriminant Analysis;

Independent Variables: GROUP *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 59.43% | 40.57% |
| A2. Canonical correlation | .69 | .62 |

| B. MAKEUP OF FUNCTIONS | | |
|---|---|---|
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Listening, people, contrast, multiple means | Poor motivation, difficult languages |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *LANGUAGE-CONTRAST Mention* | .64 | .40 |
| *LISTENING Mention* | .63 | -.07 |
| *MULTIPLE Quality* | .59 | -.22 |
| *PEOPLE Mention* | .50 | .05 |
| *MOTIVATORS Quality* | .24 | -.72 |
| *LANGUAGE-CONTRAST Quality* | -.37 | -.53 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| *LANGUAGE-CONTRAST Mention* | .44 | .38 |
| *PEOPLE Mention* | .41 | -.02 |
| *LISTENING Mention* | .41 | -.04 |
| *MOTIVATORS Quality* | .18 | -.78 |
| *LANGUAGE-CONTRAST Quality* | -.07 | -.42 |

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**Graph 5.4.5/xiii:** *Solo/Mixed Failure Profile* **(GROUP Functions)**
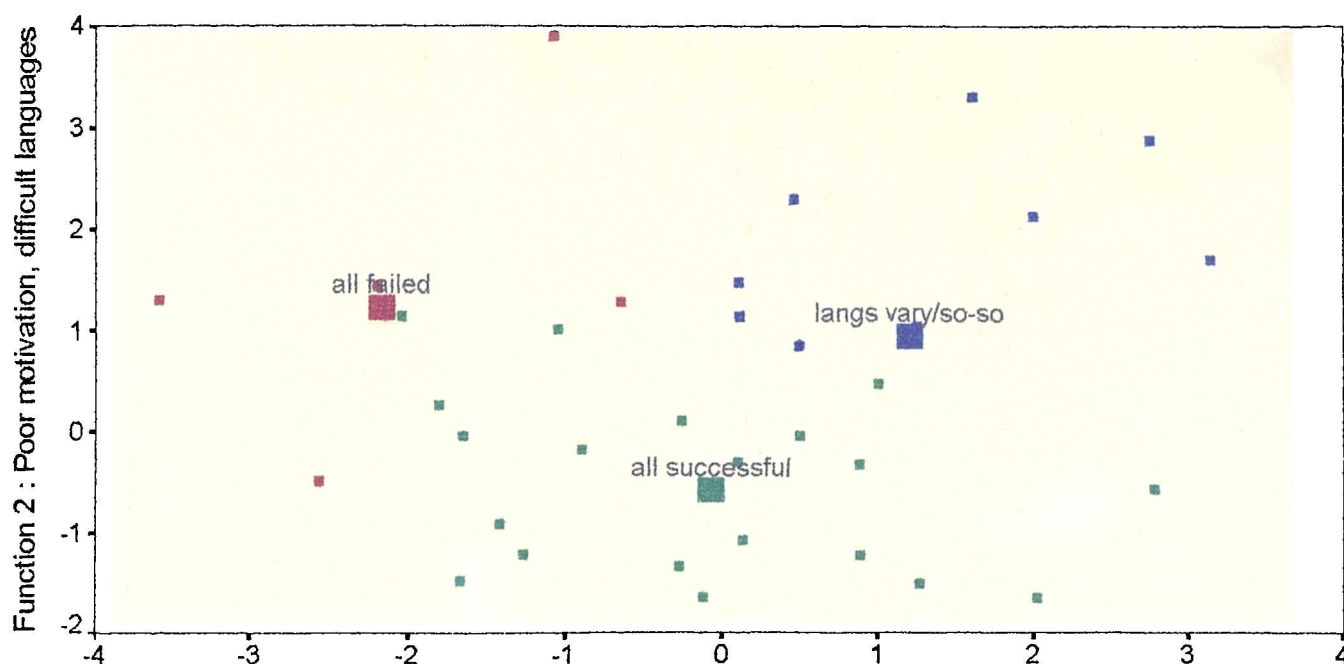


Function 1 : Listening, people, contrast, multiple means

large squares = means, small squares = individual cases

Both Function 1 (canonical correlation .69) and Function 2 (.62) show a moderately strong link between *Solo/Mixed Failure Profile* and GROUP tags. Sense of success/ failure, it seems, is more strongly linked to learning strategies and processes than to external achievement (contrast the weak linkages at Learner-Profile and Individual-Language level: Sub-Sections 5.4.2.d.ii, 5.4.3.b.vi).

Function 1 is made up of *Mention* of *LANGUAGE-CONTRAST*, *LISTENING* skills and *PEOPLE*-based strategies (moderate coefficients and weak correlations), plus a sub-group with good-*Quality* experiences of combining various packages, package components and/or learning means (*MULTIPLE*: coefficient .59, no meaningful correlation). This is very much a mixed bag, and no better name could be found than "Listening, people, contrast, multiple means".

Function 2 is much more distinct, consisting of two elements: problematic MOTIVATORS (strong negative *Quality* values), plus problems with *LANGUAGE-CONTRAST* (weaker negative *Quality* values). Function 2 was therefore named "Poor motivation, difficult languages".

The Graph shows a three-way relationship between the three *Solo/Mixed Failure Profile* categories. The all languages failed group (red: low scores on Function 1, high on Function 2) tend not to mention people and listening, to have poor motivation, and to have problems combining different materials or learning means; language-contrast factors are rarely mentioned, or are seen as problematic. The all languages successful group (green: low on Function 2, neutral on Function 1) have good motivation, and find their self-instructed languages easy to learn. The languages vary and/or so-so group (blue: high on both Functions) mention people and listening more, and find it useful to combine different learning means or materials. They mention language-contrast more, but also have more problems here; and they also complain of poor motivation[71].

The results of the Keyword Discriminant Analysis are shown in Table and Graph 5.4.5/xiv below:

### Table 5.4.5/xiv

*Solo/Mixed Failure Profile*: Discriminant Analysis;

Independent Variables: Keyword *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 66.40% | 33.60% |
| A2. Canonical correlation | .72 | .60 |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Learnability, etc. | Content/ syllabus unimportant, poor motivation |

---

[71] As the likelihood of the languages vary category increases with language-count, there may be a partial language-count effect here.

## Table 5.4.5/xiv (continued)

| B2. Key-Variable:Function Coefficient Matrix | Function 1 | Function 2 |
|---|---|---|
| *(LANG.-CONTRAST:) Learnability Mention* | .88 | .06 |
| *(COMPONENTS:) CourseVideo Mention* | -.54 | .29 |
| *(LISTENING:) Listening Quality* | -.51 | -.30 |
| *(MOTIVATORS:) LearningPleasure Quality* | -.47 | -.33 |
| *(PEOPLE:) Country Mention* | .45 | -.42 |
| *(INPUT:) Content/Syllabus Mention* | .29 | -.66 |
| *(MOTIVATORS:) Motivation Quality* | -.18 | -.55 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | Function 1 | Function 2 |
| *(LANG.-CONTRAST:) Learnability Mention* | .55 | - |
| *(MOTIVATORS:) Motivation Quality* | - | -.53 |
| *(INPUT:) Content/Syllabus Mention* | - | -.43 |
| *(LISTENING:) Listening Quality* | - | -.41 |
| *(PEOPLE:) Country Mention* | - | -.40 |

**Graph 5.4.5/xiv:** *Solo/Mixed Failure Profile* **(Keyword Functions)**
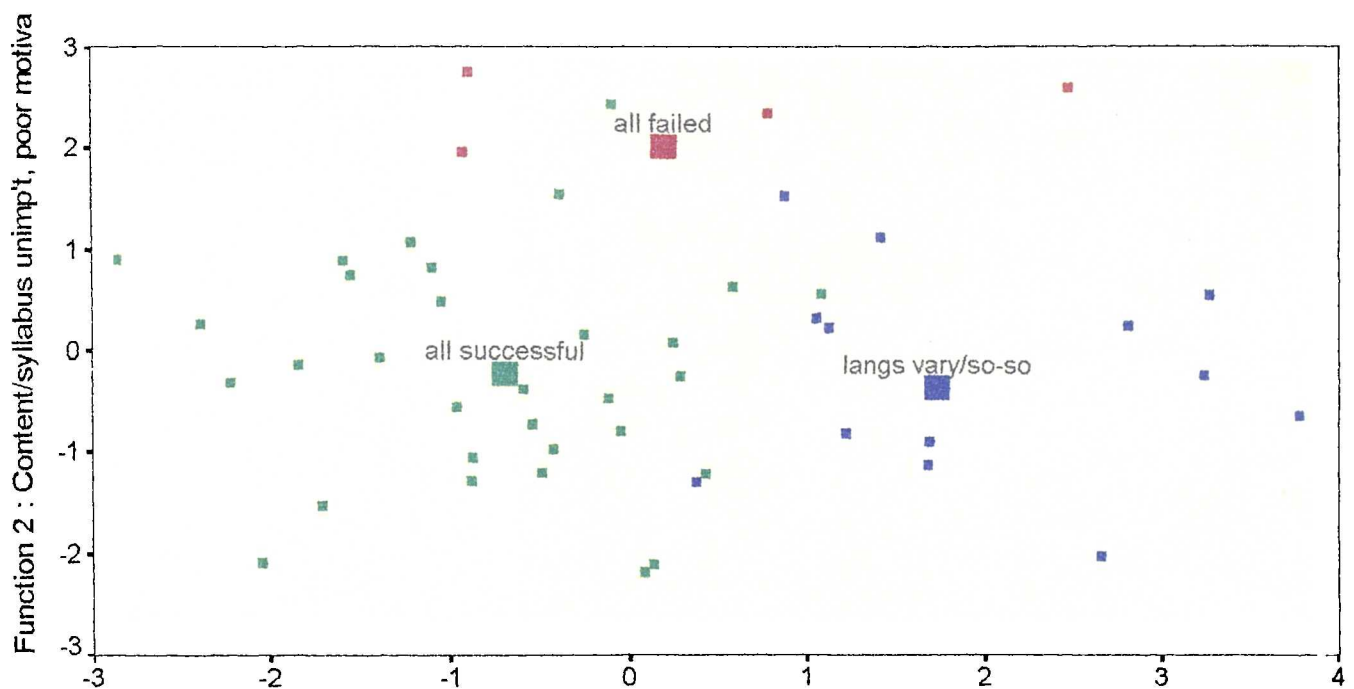


Function 1 : Learnability, etc.

large squares = means, small squares = individual cases

A strong Function 1 (canonical correlation .72) and a moderately strong Function 2 (.60) were generated, showing clear links between *Solo/Mixed Failure Profile* and Keywords.

The Coefficients and Correlation Matrices show Function 1 to be made up mainly of *Learnability Mention* (strong coefficient, moderate correlation: .88, .55). Lesser, non-overlapping features (no meaningful correlations) are: under-mention of *CourseVideo*; *Listening Quality* problems; lack of language-*LearningPleasure*; and *Mention* of the L2 *Country*. This awkward bundle of elements was titled "Learnability, etc.".

Function 2 is largely made up of low *Mention* of course *Content/Syllabus* issues and of poor *Motivation* (negative coefficients and correlations). This also implies some *Listening* problems and under-*Mention* of the L2 *Country* (correlations only, weak). The Function was titled "Content/syllabus unimportant, poor motivation".

The Graph shows that the all languages failed group (red: high scores on Function 2, neutral on Function 1) tend not to mention content/syllabus issues, and - again - to have poor motivation. The all languages successful group (green: low on both Functions) tend to have good motivation; they also mention content/syllabus issues more and L2-learnability less. The languages vary and/or so-so group (blue: high on Function 1, low on Function 2) also tend to have good motivation and to mention content/syllabus issues; they over-mention L2-learnability issues too, however[72].

### 5.4.5.d.iii *Solo/Mixed Maximum Command*

The results of the GROUP Discriminant Analysis are shown in Table and Graph 5.4.5/xv below:

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[72] As the likelihood of the languages vary category increases with language-count, there may be a partial language-count effect here.

Table 5.4.5/xv

*Solo/Mixed Maximum Command*: Discriminant Analysis;

Independent Variables: GROUP *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 80.48% | 19.52% |
| A2. Canonical correlation | .71 | .44 |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | Packages, poor discipline & oracy | Metalanguage, poor series |
| B2. Key-Variable:Function Coefficient Matrix | | |
| - | Function 1 | Function 2 |
| *COMPONENTS Mention* | .74 | -.31 |
| *EFFORT/PLANNING Quality* | -.62 | -.01 |
| *LISTENING Quality* | -.61 | -.43 |
| *SPEAKING Quality* | -.59 | -.23 |
| *METALANGUAGE Mention* | -.49 | .68 |
| *PUBLISHERS Quality* | .39 | -.57 |
| B3. Independent-Variable:Function Correlation Matrix (correlations $\geq$ .40 only) | | |
| | Function 1 | Function 2 |
| *METALANGUAGE Mention* | - | .54 |
| *LISTENING Quality* | - | -.49 |
| *PRACTICE Quality* | - | -.48 |
| *PUBLISHERS Quality* | - | -.46 |

**Graph 5.4.5/xv:** *Solo/Mixed Maximum Command* **(GROUP Functions)**



**Function 1 : Packages, poor discipline & oracy**

large squares = means, small squares = individual cases
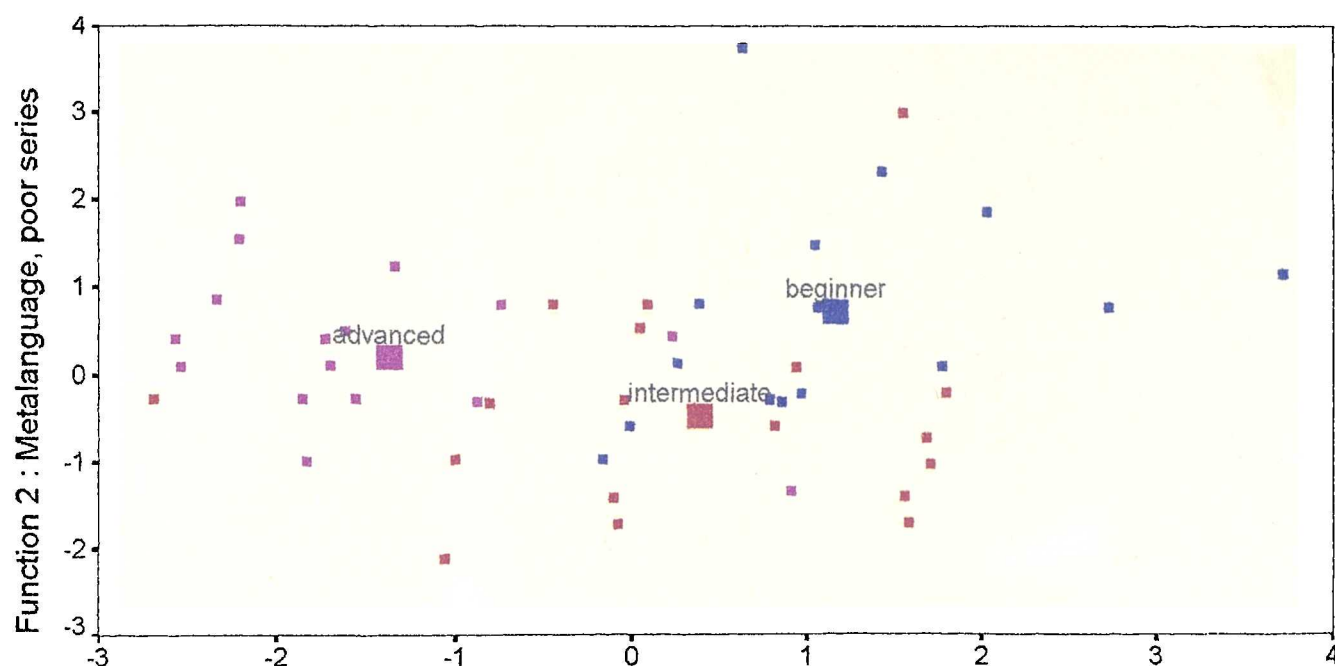
Here, Function 1 is strong (canonical correlation .71), whereas Function 2 is weak (.44).

Function 1 combines four minor, non-overlapping features (moderate coefficients, no meaningful correlations): high *Mention* of package *COMPONENTS*, problematic *EFFORT/ PLANNING* strategies, and problematic *LISTENING* and *SPEAKING* experiences. It was titled "Packages, poor discipline & oracy".

Function 2 is made up mainly of high *Mention* of *METALANGUAGE* features (moderate coefficient and correlation: .68, .54), plus problems with named *PUBLISHERS* and published series (moderate-to-weak coefficient and correlation: -.57, -.46): hence its name of "Metalanguage, poor series". This also implies problems with *LISTENING* and output *PRACTICE* features (weak correlations only: -.49, -.48).

The Graph shows that the three maximum-command categories are arranged in a roughly linear fashion along the horizontal Function 1 axis, with decreasing proficiency shown by increasing Function scores: advanced (pink) ⇨ intermediate (red) ⇨ beginner (blue). There is, however, a slight tendency towards a triangular relationship, with Function 2 pulling the categories apart along the vertical axis.

It appears that those who have not progressed beyond beginner level in a self-instructed language (high scores on both Functions) have a strong focus on published packages, often mentioning package components and coursebook metalanguage, but tending to find specific named publishers/series problematic; they may also find speaking or listening difficult, and/or have problems applying effort and planning strategies. Specific features of those who get as far as intermediate level (low on Function 2, neutral on Function 1) are slight tendencies towards greater satisfaction with named publishers/series and lower mention of metalanguage. Those who get as far as advanced level in at least one self-instructed language (low on Function 1, neutral on Function 2) mention off-the-shelf package components less, have enjoyable listening and/or speaking experiences, and/or see themselves as having good effort and planning strategies.

The results of the Keyword Discriminant Analysis are shown in Table & Graph 5.4.5/xvi below:

### Table 5.4.5/xvi

*Solo/Mixed Maximum Command*: Discriminant Analysis;

Independent Variables: Keyword *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 77.40% | 22.60% |
| A2. Canonical correlation | .65 | .42 |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | Real-life listening & speaking | Class & hard-work problems |

Table 5.4.5/xvi (continued)

| B2. Key-Variable:Function Coefficient Matrix | | |
|---|---|---|
| | Function 1 | Function 2 |
| (LISTENING:) RecordedText Mention | .79 | .38 |
| (PEOPLE:) NativeSpeaker Mention | .60 | .35 |
| (CLASSWORK:) Class Quality | .28 | -.69 |
| (EFFORT/PLANNING:) HardWork Quality | .46 | -.59 |
| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| (LISTENING:) RecordedText Mention | .58 | .47 |
| (PEOPLE:) NativeSpeaker Mention | .52 | - |
| (LISTENING:) RecordedText Quality | .43 | - |
| (CLASSWORK:) Class Quality | - | -.62 |
| (EFFORT/PLANNING:) HardWork Quality | - | -.59 |

**Graph 5.4.5/xvi:** *Solo/Mixed Maximum Command* (Keyword Functions)



Function 1 : Real-life listening & speaking

large squares = means, small squares = individual cases
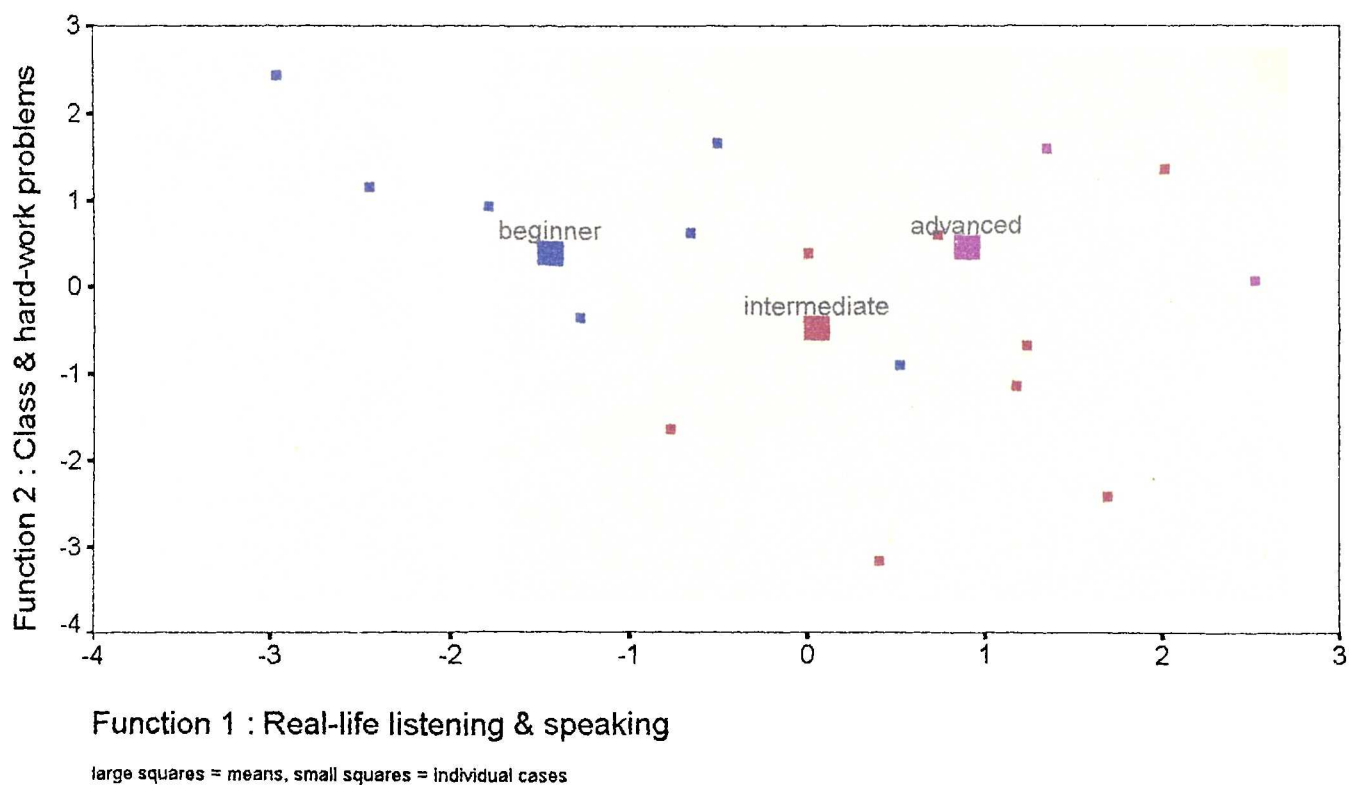
Here, Function 1 is moderately strong (canonical correlation .65), whereas Function 2 is weak (.42).

Function 1's main features are high *Mention* of authentic *RecordedText* materials and of *NativeSpeakers* (moderate positive coefficients and correlations); as the former is generally favourably rated, there is also a weak correlation (.43) with *RecordedText Quality*. Function 1 was named "Real-life listening & speaking"

Function 2 is composed of problems with *Class* and with *HardWork* (moderate negative *Quality* coefficients and correlations).

In the Graph we see a similar picture to the GROUPs situation above. The command categories show a largely linear progression along the horizontal Function 1 axis - though this time  beginner (blue) ⇨ intermediate (red) ⇨ advanced (pink) - together with slight inter-group variations expressed by a weak Function 2.

Assuming (as with the GROUPs test above) that Function 2 is not a sampling artefact, it appears that those who have not progressed beyond beginner level in a self-instructed language (low scores on Function 1, high on Function 2) tend not to mention authentic recordings or native speakers, and tend to have problems finding a class (the chief problem with the *Class* Keyword: 5.4.4.j.i) and with the hard work involved in language learning. Specific features of those who get as far as intermediate level (low on Function 2, neutral on Function 1) are a slight tendency towards good reports of classwork and of their abilities to work hard. Those who get as far as advanced level in at least one self-instructed language (high on both Functions) mention authentic recordings and native speakers the most, but also - strangely, perhaps - have a slight tendency to bemoan the lack of classwork and their inability to work hard.

### 5.4.5.d.iv *Solo/Mixed Dropout Profile*

The results of the GROUP Discriminant Analysis are shown in Table and Graph 5.4.5/xvii below:

**Table 5.4.5/xvii**

*Solo/Mixed Dropout Profile*: Discriminant Analysis;

Independent Variables: GROUP *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 97.49% | 2.51% |
| A2. Canonical correlation | .51 | .10 |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | Aptitude & package-wiseness | - |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *EXPERTISE Mention* | .84 | - |
| *COMPONENTS Mention* | .68 | - |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| *EXPERTISE Mention* | .74 | - |
| *COMPONENTS Mention* | .56 | - |

**Graph 5.4.5/xvii:** *Solo/Mixed Dropout Profile* (GROUP Functions)
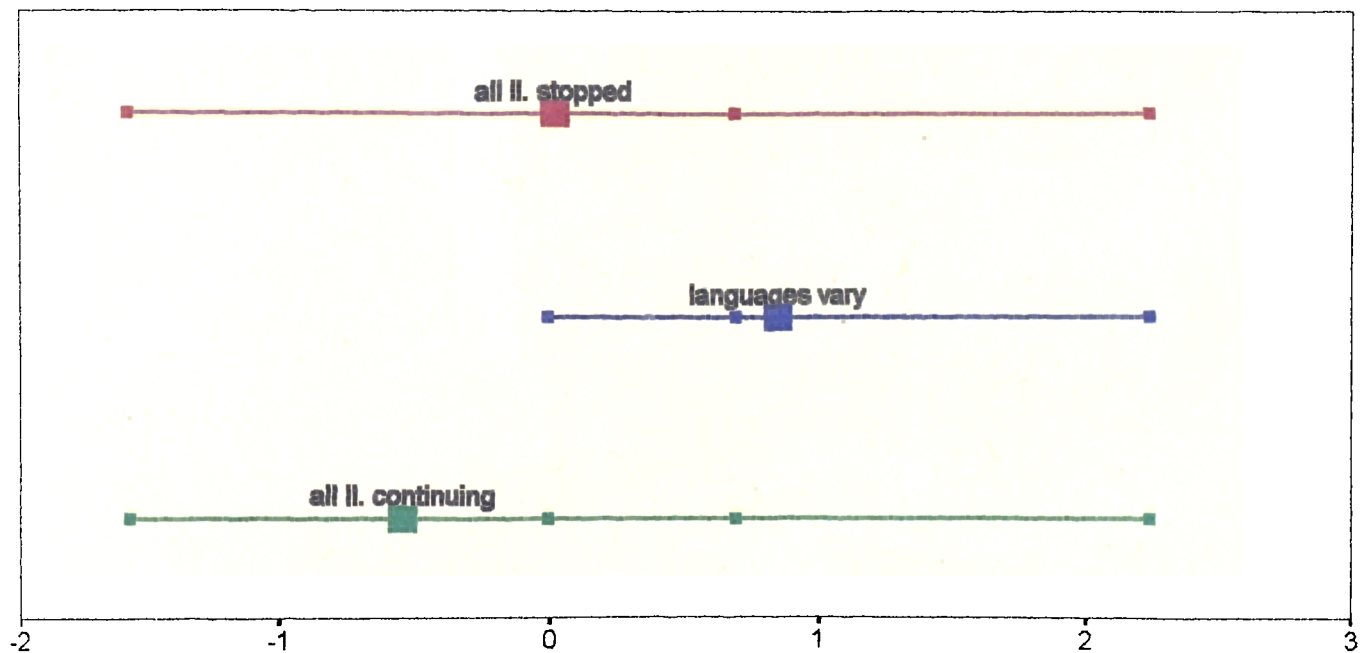


Function 1 : Aptitude & package-wiseness

large squares = means, small squares = individual cases

Only Function 1 comes over the .40 canonical correlation threshold, at .51, showing a moderate linkage between *Solo/Mixed Dropout Profile* and GROUPs.

Function 1's discriminants seem experience-based: *Mentions* of the aptitude cluster *EXPERTISE* (moderate coefficient, strong correlation: .84, .74) and of package *COMPONENTS* (moderate coefficient and correlation: .68, 56). The Function was named "Aptitude and package-wiseness".

The Graph shows a progression from all languages continuing (green) through all languages stopped (red) to languages vary (blue). If the Function had been measuring dropout alone, one would have expected languages vary to have been the middle category, with continuing and stopped at the ends. Moreover, the categories show a lot of overlap, reflecting the unspectacular canonical correlation of .51; in other words, there is very little linkage between dropout/continuation per se and the rest of the data. What the Graph does show is that the languages vary group (high-scoring on Function 1) tend to evaluate their own aptitude (for good or ill) more than others, and mention package components more, whereas the all languages continuing group (low-scoring) tend to show less self-examining, and mention package components less. Dropout per se (the all languages stopped category: neutral on Function 1) appears to have no distinguishing features.

This pattern is repeated in the Keyword analysis: see Table & Graph 5.4.5/xviii below:

### Table 5.4.5/xviii

*Solo/Mixed Dropout Profile*: Discriminant Analysis;

Independent Variables: Keyword *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTION | |
|---|---|
| | Function 1 |
| A1. %age of dataset variance accounted for | 100.00% |
| A2. Canonical correlation | .42 |
| B. MAKEUP OF FUNCTION | |
| B1. Suggested Name | |
| | Function 1 |
| | Aptitude |

**Table 5.4.5/xviii (continued)**

| B2. Key-Variable:Function Coefficient Matrix | |
| --- | --- |
| | Function 1 |
| *(EXPERTISE:) Aptitude Mention* | 1.00 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | |
| | Function 1 |
| *(EXPERTISE:) Aptitude Mention* | 1.00 |
| *(ENJOYABILITY:) Variety Mention* | .50 |

**Graph 5.4.5/xviii:** *Solo/Mixed Dropout Profile* **(Keyword Functions)**
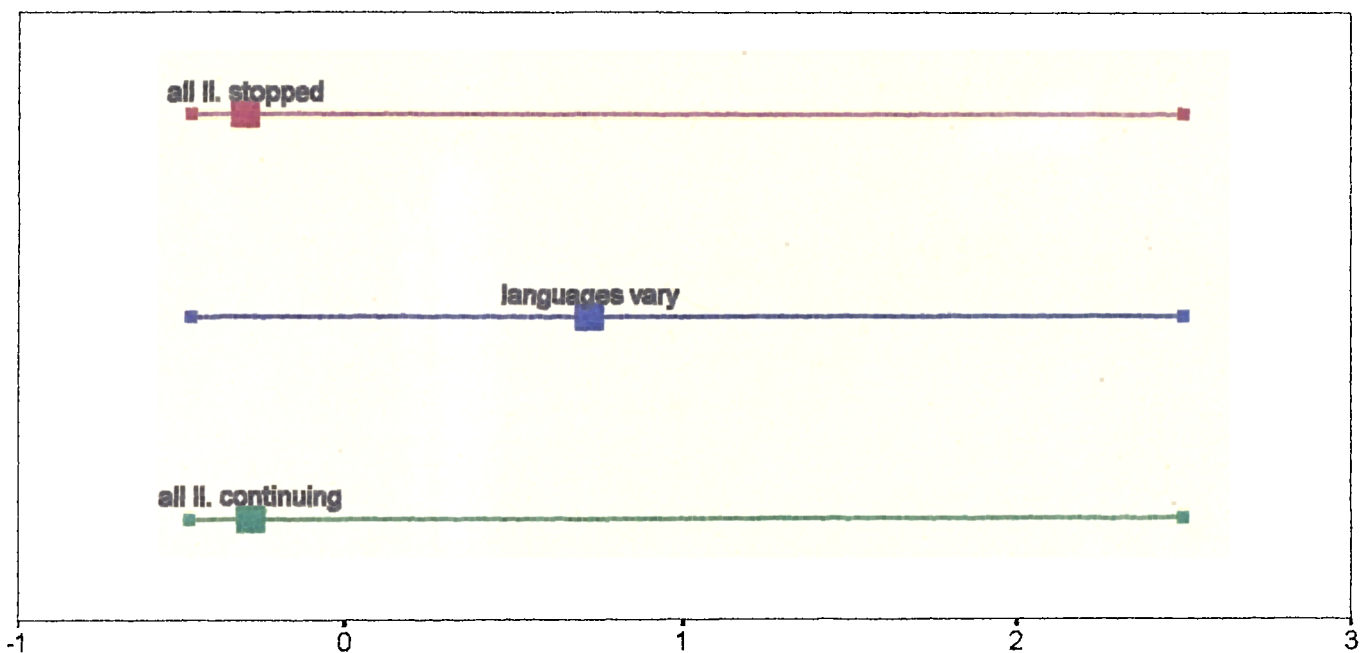


## Function 1 : Aptitude

large squares = means, small squares = individual cases

There is one weak Discriminant Function - only just over the .40 canonical correlation threshold, at .42. The Coefficient Matrix shows that it is solely made up of the *Aptitude* Keyword, though the Correlation Matrix adds *Mention* of the *ENJOYABILITY* Keyword *Variety*.

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The Graph shows that all languages stopped (red) and all languages continuing (green) have virtually the same mean value. The only distinctive category is languages vary (blue: high-scoring), showing that such subjects have a slight tendency to mention aptitude more than others; but as the likelihood of this category increases with language-count, this may well be a language-count effect anyway. In other words, where ±dropout per se was only very weakly discriminated at GROUP level, it is non-existent here.

### 5.4.5.e Factor 4: Environment effects

The variables forming this Factor are *Solo/Mixed Maximum Country Experience* and *Solo/Mixed Maximum Command*. Results for the latter have already been presented in 5.4.5.d.iii above.

#### 5.4.5.e.i Solo/Mixed Maximum Country Experience

A GROUPs Discriminant Analysis failed to generate Discriminant Functions with canonical correlations above the .40 threshold (one Function at canonical correlation .38 only).

The Keywords Analysis was successful, however: see Table & Graph 5.4.5/xix below:

**Table 5.4.5/xix**

*Solo/Mixed Maximum Country Experience*: Discriminant Analysis;

Independent Variables: Keyword *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 89.15% | 10.85% |
| A2. Canonical correlation | .54 | .22 |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | Feedback, no fun, no country | - |

**Table 5.4.5/xix (continued)**

| B2. Key-Variable:Function Coefficient Matrix | | |
|---|---|---|
| | Function 1 | Function 2 |
| *(ASSESS'T:) Assessment/Feedback Mention* | .72 | - |
| *(PEOPLE:) Country Mention* | -.70 | - |
| *(ENJOYABILITY:) IntrinsicInterest Quality* | -.67 | - |
| **B3. Independent-Variable:Function Correlation Matrix** (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| *(ASSESS'T:) Assessment/Feedback Mention* | .53 | - |
| *(PEOPLE:) Country Mention* | -.49 | - |
| *(PEOPLE:) Informant Mention* | .44 | - |
| *(ENJOYABILITY:) IntrinsicInterest Mention* | -.44 | - |
| *(ENJOYABILITY:) IntrinsicInterest Quality* | -.42 | - |

**Graph 5.4.5/xix:** *Solo/Mixed Maximum Country Experience* **(Keyword Functions)**
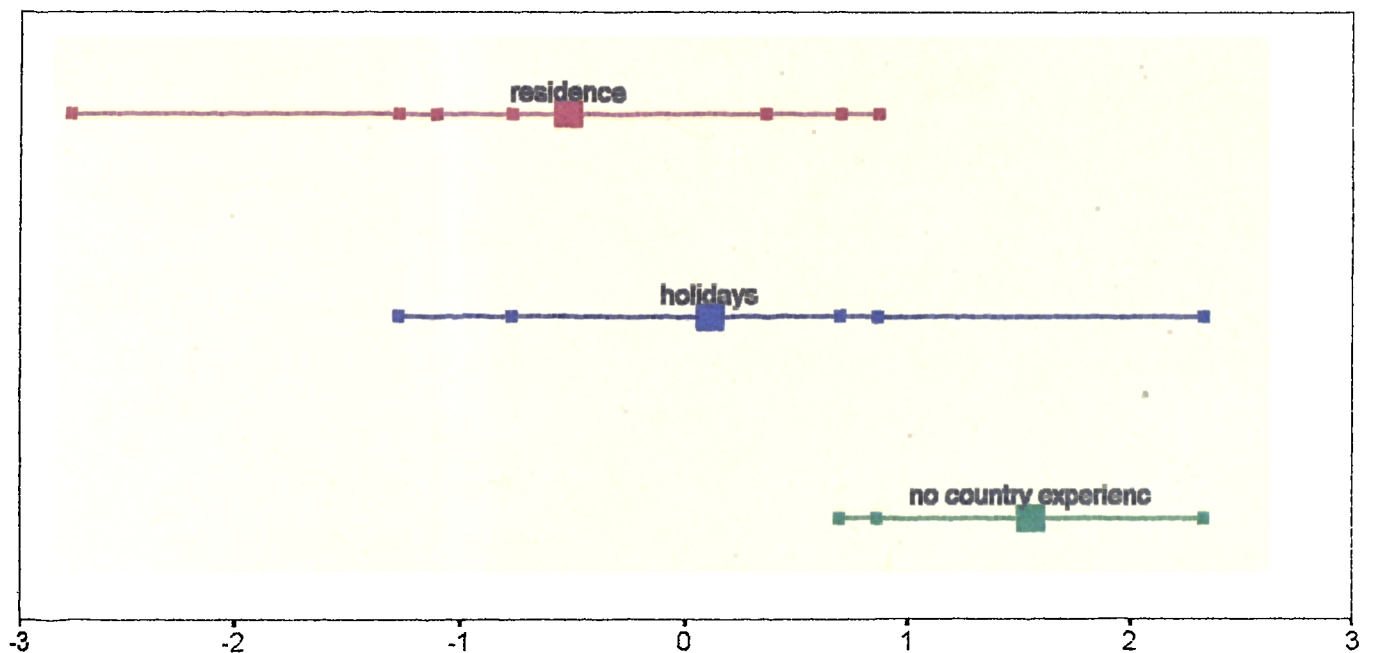


Function 1 : Feedback, no fun, no country

large squares = means, small squares = individual cases

Only Function 1, at a moderate canonical correlation of .54, came over the .40 threshold.

Function 1 is made up primarily of over-*Mention* of *Assessment/Feedback*, under-*Mention* of the L2 *Country*, and poor *IntrinsicInterest* from learning materials (moderate coefficients, weakish correlations). This also implies under-*Mention* of *IntrinsicInterest*, and a certain awareness of the value of language *Informants* (weak correlations only). The Function was named "Feedback, no fun, no country".

The Graph shows that those with no L2 country experience (green: high-scorers) tend not to mention the L2 country; instead, they are more concerned with the assessment/feedback issue, and tend to find little intrinsic interest in their learning materials. Those with experience of residence in at least one L2 country (red: low-scorers), by contrast, mention the country more (and assessment/feedback less), and find their learning materials more interesting. Those who have only been on holidays to L2 countries (blue) fall in between.

## 5.4.5.f Summary of cross-link findings

Except for *Class-Only Exotic Experience*, the Class-Only variables again show little linkage with self-instruction. What seems to be important is whether learners have Class-Only experience, or not. The latter group, i.e. those with self-instructed experience in all their languages, seem to mention not only more published package work (especially video use), but also more strategies generally, being especially concerned with such issues as memorisation, time management and working hard.

The effects of increasing language experience in language count terms seem to tail off quite quickly - after the second or third foreign language. The more polyglot learners (in terms of both *Total* and *Solo/Mixed Language Count*) tend to have more self-awareness (more *Mentions* overall) and better-quality learning experiences. In particular, they mention writing more, and/or better experiences of listening and practice.

Experience in terms of the highest command attained in a (Solo/Mixed) language is again linked to skills work. Those who reach higher proficiency levels tell of good listening and speaking experiences (especially with authentic texts and native speakers), and see themselves as having good metacognitive (effort/planning) strategies.

"Exotic" experience, in both Class-Only and Solo/Mixed mode, produces strong awareness of self-instructed writing. Differences are that Class-Only exotic experience is linked to under-mention of strategies, whereas Solo/Mixed exotic experience is linked to a rich complex of strategic awarenesses.

Increasing dominance of self-instruction in Solo/Mixed mode is linked to general package-handling skills and awareness, to higher metacognitive awareness (i.e. routine-setting and motivation), though also to vocabulary problems.

Success and failure are linked mainly to motivation, and to perceptions of the L2's intrinsic ease/difficulty.

Tendency to dropout has little reflection at this learner-based level, confirming its status as a purely individual-language feature.

Those with little or no L2-country experience appear to be more concerned with the assessment and feedback issue; otherwise, there is little linkage with reported learner behaviour.

In contrast to the Keywords, GROUP tags often seem to sort out the signal from the noise, giving a strong justification for their adoption (cf. the methodological caveat in 5.3.2.c). The implications of all the results will now be discussed in depth.

# 5.5 Discussion

This section discusses the main-study findings. It first takes the angle of external achievement, looking at Learner-Profile and Individual-Language effects, but also integrating the Cross-Link findings to show how external achievement interacts with perceptions of strategies, learner-individual factors and processes (5.5.1). After a brief look at the gender question (5.5.2), I then focus more closely on the perceptions themselves - the GROUP/Keyword data (5.5.3).

## 5.5.1 Learners and achievements

### 5.5.1.a Introduction

In terms of external achievement, a self-instructed learner's experience profile - assuming I have omitted no key variables from the model - appears to consist of four main Factors (Learner-Profile Factor Analysis: 5.4.2.a). These are:

1. **Quality** of self-instructed experience, with mixed learning means (classwork + self-instruction) giving the highest command, continuation-rates and sense of success, and self-instruction-only the worst.

2. **Quantity** of self-instructed experience, with higher language counts also implying experience of "exotic" languages.

3. **L2 environment** effects on self-instructed languages, with length of L2 country stay increasing command.

4. **Class-only** language experience.

Data on individual language projects involving self-instruction (Individual-Language Factor Analysis: 5.4.3.a) backs up this picture. Here, of course, without a language-

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count dimension, Factor 2 becomes reduced to the "exotic" dimension alone; and without a class-only learning project dimension, Factor 4 does not exist.

The ordering of the above Factors is based on relevance to the aims of the study rather than the strength orders generated by the Factor Analyses: the latter are, to a great extent, an artefact of which variables it was thought relevant to include in the model, and how far they overlap. The discussion of the Learner-Profile and Individual-Language findings, however, follows the order of Factors 1-3 above. As class-only languages appear peripheral to the self-instructed experience except as a point of comparison, they are absorbed into the learning-means Sub-Section (5.5.1.b).

## 5.5.1.b Learning means

Choice of learning means - self-instruction, classwork or a combination of the two - appears to be a key learner decision in terms of final outcomes.

### 5.5.1.b.i Self-instruction alone

The higher the presence of self-instruction in a learning project - especially at the beginning - the weaker the achievement: lower command, higher dropout and higher perceived failure rates (Learner-Profile and Individual-Language Factor Analyses: 5.4.2.a, 5.4.3.a). In the protocols (5.4.4.j.i), the learners themselves give reasons, specifying the gaps in self-instruction that classwork fills: motivation and discipline on the one hand, and communicative practice and feedback on the other (cf. 5.5.1.b.ii below).

Links with perceived failure per se, however, are much less strong at Individual-Language than at Learner-Profile level. In other words, learners who prefer self-instruction as initial learning means tend to be those who do not get very far in proficiency or perseverance terms, and who see themselves as unsuccessful. But for an otherwise successful and/or proficient learner, the occasional self-instructed language may equally well be a "successful" means of achieving a limited, short-term goal - such as getting a smattering of a language for a one-off visit to a country.

Some learners (protocol extracts 5.4.4.j.i) recommend self-instruction when living in the L2 country. Length of stay in the L2 environment is the other main predictor of proficiency besides learning means (cf. 5.5.1.h below), indicating that it can compensate for self-instruction's defects - probably by increasing motivation and opportunities for interaction.

High use of self-instruction encourages certain strategies (Cross-Links 5.4.5.d.i). Not only greater package use, as is fairly obvious, but also "package-wiseness" - including the crucial ability to cope with a course's input gradient and pace - and awareness of the importance of setting up good working routines.

On the negative side, high self-instruction users cite vocabulary as problematic. Most of these citations are criticisms of teach-yourself packages (*VOCABULARY* protocols: 5.4.4.f.ii). A frequent complaint is that the style and register of the target lexis is outdated or inappropriate for the learner's purpose. Outdatedness is not merely a problem of old courses: Roberts (1995) reports that several of the most expensive self-instruction packages now being marketed are shamefully outdated in content and method. As for inappropriacy, the protocols reveal conflicting learner needs: whilst many learners like holiday-oriented courses (typical, it seems, of the highly-used BBC packages), others want something more - such as formal, occupational/academic register.

This brings us back to the key question posed in the Introduction (1.1): "What is so bad about teach-yourself packages?" The interviewees - like the researcher, in the Packages Checklist and the Diary - have little time for the classroom methodologists' implied answer of "Everything". But a problem there is - one which seems, at least in part, to lie deeper than the package: the fact that ab initio self-instruction itself is a hard task. This, however, is not much help to learners who have to or want to teach themselves a foreign language. But it seems that, if a package is to be popular amongst learners, choice of target lexis is a key design consideration. Generally speaking, the courses that take this advice seriously (e.g. the BBC publications: see Index) are the ones that are most used and best rated.

If appropriacy, by contrast, is much more a question of horses for courses, this implies that language centres - and bookshops - should stock a variety of packages aimed at different target learners. In the "minor" languages, however, such a variety may simply not exist.

### 5.5.1.b.ii Classwork alone

This appears to lead to higher proficiency than self-instruction alone (*Overall Learning Means*: 5.4.3.b.iii). Perhaps the main reason is that suggested by interviewees (*CLASSWORK* protocols: 5.4.4.j.i): that class courses set up working routines for learners (which at secondary school are difficult or impossible to break!), thus keeping them learning for longer. Interviewees also mention the value of teachers, and the provision of speaking practice and of feedback. Whether this makes classwork intrinsically superior, hour for hour, to self-instruction is hard to say from the present evidence, as no absolute learning time variable was included in the model[73].

Links between class-only and self-instructed learning at Learner-Profile level are conspicuous by their absence, and cross-links between *Class-Only* variables and subjective self-instructed reports are also few (5.4.5.b). Also, many of the latter that exist are negative: higher class-only experience correlates with lower strategy/materials awareness, especially memorisation, time management and video use - presumably because the class-only learner has less need to develop independent learning strategies. There are, however, two positive effects of class-only language experience on self-instruction. Those with a wider class-only profile - in language-count or "exotic-experience" terms - tend to find their Solo/Mixed languages easier to learn. In addition, class-only non-Romance/Germanic experience gives more awareness of writing in Solo/Mixed languages - probably through having had to tackle unfamiliar scripts.

The lack of linkage between Class-Only and Solo/Mixed languages has two main implications. Firstly, it appears that learning means are determined locally, i.e. by the opportunities and demands prevailing at each individual language attempt, rather than

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[73] Such a variable might also have thrown light on the "missing transfer effect" problem: see Sub-Section 5.5.1.g.i below.

by any personal preference. Secondly, this fact appears to argue for developing a methodology based on self-instruction's intrinsic features rather than on simply recycling the givens of classroom methodology

### 5.5.1.b.iii Mixed-Means: self-instruction plus classwork

There is overwhelming evidence that mixed learning mode is superior to self-instruction alone in terms of high command and low dropout (Learner-Profile and Individual-Language Factor Analyses, *Overall Learning Means* data: 5.4.2.a, 5.4.3.a, 5.4.3.b.iii). At least in command terms, it also appears superior to class-only work (*Overall Learning Means* data), a perception shared by a good number of learners (*CLASSWORK, MULTIPLE* protocols: 5.4.4.j.i, 5.4.4.m.i).

Various reasons may be cited. The individual advantages of classwork and self-instruction probably complement each other, as learners point out in the protocols. Classwork, as already mentioned, provides discipline, teacher inspiration and feedback, and conversation. The protocols indicate that self-instruction, by contrast, enables learners to add studial activities that suit their own learning goals or learning style, studying or revising aspects missed or glossed over by classwork (e.g. grammar); one learner cites self-instruction as "more explicit". Self-instruction also offers a better framework for skill-using strategies. Because of class time pressures and differences in what learners find intrinsically interesting, extensive reading and listening are frequently-cited autonomous activities; and study buddy groups, native speaker interaction and L2 country visits provide both interactive output practice and feedback.

There may be other reasons for the superiority of Mixed-Means, none of which need be exclusive. It may provide more learning time, especially in parallel mode (simultaneous self-instruction + classwork). And achievement may also be cause, not effect, with the keenest learners using all possible means to learn a language.

Mixed-Means appears most effective when learning starts with classwork-only (5.4.3.b.ii: *Final Learning Means*). Classwork, therefore, seems to have special advantages for the low-proficiency learner - probably that its routine-setting, teacher inspiration/feedback and all-round skills work all help the learner in the slow, hard haul up to the intermediate-proficiency real-language thresholds identified in the Learner

Diary (4.2.1.a). Interestingly, increased experience of self-instruction seems to bring increased awareness of the importance of learning stages in general, usually described by learners in terms of one means (usually classwork) providing a good "basis" for another (usually self-instruction) (Class-Only Cross-Links 5.4.5.b; protocols 5.4.4.m.i:*MULTIPLE*).

After the thresholds, self-instruction can - indeed, should - start operating. At this stage, however, it seems not to matter greatly whether self-instruction replaces or parallels classwork (5.4.3.b.ii: *Final Learning Means*). The reason is probably that real-text and interaction work, which almost certainly boost achievement at this stage, need to be autonomously-driven, whereas for the other, language-study half of effective post-threshold learning (cf. Learner Diary 4.2.1.a), fully-autonomous and teacher-led work are probably equally effective. But the fact that, for beginners, even parallel self-instruction + classwork scores worse than classwork alone indicates that the strengths of fully-autonomous work do not emerge until the thresholds have been passed.

Starting learning with classwork seems to solve the vocabulary problems identified with teach-yourself packages: classwork-first Mixed-Means learners cite good vocabulary experiences where self-instruction-first learners have more vocabulary complaints (*Solo/Mixed Initial Learning-Means Profile* Cross-Links: 5.4.5.d.i). As many "helpful" vocabulary ratings consist of autonomous strategy advice (*VOCABULARY* protocols: 5.4.4.f.ii), this implies that greater variety of learning experience[74] and/or teacher "tips" have helped classwork-first Mixed-Means learners to develop a greater range of autonomous vocabulary-learning strategies. Mixed-Means, however, also gives less package-wiseness, including more problems with input gradient and pace (*Solo/Mixed Initial Learning-Means Profile* Cross-Links) - probably because package-use skills are most necessary when starting from scratch in self-instruction-only mode.

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[74] All classwork-first Solo/Mixed languages have a self-instruction element, but not all self-instruction-first Solo/Mixed languages have a classwork element.

## 5.5.1.c Perceived Success

When designing the survey, it was anticipated that perceived success/failure would be the most crucial variable. Interestingly, however, this does not seem to be the case (thus justifying the heuristic rather than hypothesis-testing approach taken!). And though success/failure is not strong at Learner-Profile level (*Solo/Mixed Failure Profile Discriminant Analyses*: 5.4.2.d.ii), it is even weaker at Individual-Language level (*Failure*: 5.4.3.b.vi). This implies that it is measured against purely personal standards. Thus success, as mentioned earlier, may come from the achievement of extremely limited, short-term aims, and perceptions of failure can co-exist with continuing learning and reasonable proficiency. Even at person (Learner-Profile) level, the self-instructed learner has little external grounding (beyond a weak link to maximum command) for her/his success perception.

When we look at people's reports of strategies and learner characteristics, however, linkages do emerge (Cross-Links: 5.4.5.d.ii). Success appears linked to three elements. The strongest is quality of motivation, confirming the findings of a good number of studies (Literature Review 2.4.2.b.i). The second is perceived language ease: positive transfer through cognates, and intrinsic learnability. This seems to confirm the hypothesis, proposed in the Materials Checklist (3.2: Section 1) and supported by the Learner Diary (Chapter 4), that the nature of the L2 itself and its relationship to languages already known is a key factor in language learning. Nevertheless, perceptions may be more important than philological fact here, as is pointed out below (5.5.1.g). The third element in success appears to be the only purely strategic one - awareness of course content and syllabus (the others being determined by the language task in question).

However, if success is more a learner- than a language-based feature, we could also say that a successful learner is not only one who happens to have an external motivation to learn an "easy" language. She could also be someone who is self-motivated, and who finds *any* language learnable.

**5.5.1.d Command**

In this study, the command variables fulfil two roles. Firstly, command per se of a language; this depends on the interaction of two main variables (Factor Analyses 5.4.2.a, 5.4.3.a): length of stay in the L2 country, and learning means (mixed being best: see 5.5.1.b.iii above). At Learner-Profile level, however, *Solo/Mixed Maximum Command*, which denotes the command of the most proficient Solo/Mixed language, is also a marker of general language experience (thus also being linked to *Total Language Count*: Discriminant Analysis data 5.4.2.d.iii).

In strategic terms, learners with high-level experience (as defined by high *Solo/Mixed Maximum Command*: Cross-Links 5.4.5.d.iii) mention enjoyable and useful listening and speaking activities, are aware of the importance of authentic input and native-speaker interaction, and see themselves as disciplined. Learners who have only low command in their self-instructed languages mention learning packages more, confirming the Learner Diary indication that packages are mainly used at pre-threshold levels (4.2.1.a). On the other hand, they have more listening and speaking problems and less awareness of real input/output, suggesting that attempts at holistic language-use are beyond their capabilities.

This provides yet more evidence for the two-stage model of language learning already postulated. Before the intermediate threshold, the use of simplified and structured learning materials (preferably in a class setting) prevails, with a focus on skill-getting rather than skill-using. After it, the learner can - and, for maximum proficiency gain, should - add autonomous work with authentic/real-life speaking and listening. In motivational terms, a positive image of oneself as an L2 user who can feel at home in the L2 environment only appears to come once the threshold is crossed. Such a study-now, use-later view echoes Wilkins' argument (1971, 1976) that the delayed-return philosophy typical of grammar-translation (as opposed to the immediate-return philosophy of communicative approaches) is no bad thing per se[75]. In any case, it

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[75] Wilkins was actually talking about adapting course aims to learner needs: a firm foundation for later, versus more superficial but usable skills now.

implies that too much immersion or authentic input too soon can overwhelm the adult learner[76].

The two-stage model of learning postulated by the present studies has wider implications for second-language acquisition theory (cf. Literature Review 2.3.3). In recent years, a recognition of the value of explicit instruction has modified the naturalistic-is-best view (e.g. Krashen, 1985) prevalent until the mid-eighties. This has led to an espousement, in many quarters, of a twin-track "instruction plus interaction" approach (e.g. Ellis R., 1990). The present findings also support the twin-track approach, but suggest that there should be variations according to proficiency level. Up to "threshold level", explicit instruction in language form appears vital, at least for adults (lack of linguistic explicitness is a frequent learner complaint about even moderately inductively-oriented materials: *METALANGUAGE* and *GRAMMAR* protocols 5.4.4.d.iv, 5.4.4.e.iii). Because of learners' problems with coping with authentic texts and naive native-speaker interactions, practice would seem more effective if it is with fellow learners, learning-exchange partners or teachers, and input better if it is simplified to a "comprehensible" level (Krashen, 1985; cf. Clarke 1989). Instruction in language form (and access to it: cf. Meara, 1993) should also be relatively intensive in the early stages, in order to get the learner's knowledge-base up to threshold level as soon as possible. After threshold level, however, authentic input and native-speaker interaction come into their own, and (self-)instructed work on language form should probably lessen in importance, taking on an input-checking and -consolidating role (Learner Diary 4.2.1.a).

Finally, as these strategic reports are statistically linked to command in the learner's strongest language, what happens to an advanced self-instructed user of one language who begins another one? Presumably the awareness gained will not go away; but it would be very surprising if real language use did not cause difficulty up to the learning thresholds. This was the case in the Learner Diary (Chapter 4), where strategies gained

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[76] Advocates of the deep-end metaphor in language learning tend to forget that it is a highly perilous method in the literal sense. Ask any swimming teacher.

from advanced-level self-instructed Dutch, say, did not reduce my real-life listening problems with (lower-)intermediate Hungarian.

### 5.5.1.e Dropout

A dipstick measure of dropout/continuation at the point of interview is given by the *Dropout (-Profile)* variables. It appears more dependent on the language being learnt than on the learner (Discriminant Analyses: 5.4.3.b.iv, 5.4.2.d.iv; Cross-Links 5.4.5.d.iv).

The Individual-Language findings support the suggestion made earlier that classwork might help, inter alia, by ensuring longer learning runs: the more classwork in these self-instructed projects, the lower the dropout (Individual-Language Factor Analysis, *Dropout* Discriminant Analyses: 5.4.3.a, 5.4.3.b.iv). And they certainly support the popular notion that purely self-instructed projects tend to be quickly abandoned.

Low dropout is also linked to high proficiency - perhaps because "learning" at advanced level is relatively painless, and need involve little more than topping up with authentic input and native-speaker interaction. A number of languages linked to native-country residence, however, are abandoned - either because they are no longer needed, or because proficiency is felt to be high enough (as a result of the native-environment boost) for learning to stop.

### 5.5.1.f Language count

We now turn from quality to quantity of self-instructed experience. The fact that the two are relatively unlinked (Factor Analysis 5.4.2.a) is useful, for it means that the Diary quality-of-learning experiences are not merely a product of the Diarist's high language-count.

Multiple language-learning experience, in fact, is the rule rather than the exception. 90% of interviewees have more than 1 foreign language overall; almost 20% (13/70)

have 5 or more; and the highest language tally in the sample is 10. As for self-instructed languages, most learners (58/70) have 1 or 2 such languages, and the maximum tally is 6. Increasing language tallies (both overall and self-instructed) only have statistical effects, however, up to a count of about three; afterwards, they are overshadowed by the peculiarities of individual learners[77]. This gives further support to the claim that, though few interviewees have as many languages as the Diarist (11 overall, 5 self-instructed: Chapter 4), this fact need not invalidate his reports.

High self-instructed language counts are linked to several non-count Learner-Profile features (*Solo/Mixed Language Count* Discriminant Analyses: 5.4.2.c.i). The strongest (backed up by the Factor Analysis: 5.4.2.a) is a general tendency to try out "exotic", i.e. non-Romance/Germanic languages; this will be discussed in the next Sub-Section.

Another is a tendency, amongst a "language-enthusiast" sub-group of learners, to use self-instruction to start a relatively high number of languages. Earlier discussions have shown that they do not necessarily feel they have been successful in this, and will usually stop learning at a relatively low level. Nevertheless, getting a smattering of a large number of languages is presumably a worth-while goal for them, whether out of general linguistic interest or the urge to get more out of a one-off holiday in the L2 country. The BBC has attempted to cater for this sub-group with its *Get By* series (see Table 3.1.3/i). These very short books can realistically be worked through in a few weeks, and aim to supply the casual visitor with the bare necessities of survival in the language.

In strategic terms (Cross-Links: 5.4.5.b.iv, 5.4.5.c.i), higher *Total* and *Solo/Mixed* language counts are linked to good experiences with listening, and less concern with listening, understanding in general, and speaking; conversely, the less polyglot learners have more listening problems, and mention listening, understanding and speaking more. This echoes but also modifies the high-low command split discussed earlier, where greater or lesser satisfaction with speaking and listening activities is what divides high-proficiency from low-proficiency learners. Though to a certain extent the problems of

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[77] This might also be an effect of low learner numbers at higher language counts; only a larger sample would clarify this issue.

tackling a new language are always the same, narrowness of experience appears to make one fixated on the tackling of a key low-proficiency problem - that of getting oracy up to the "survival competence" threshold. Wider experience, however, appears to let one see beyond this problem, and worry about it less.

Wider experience also gives more awareness of writing (perhaps through the increasing chance of having tried a non-Latin script) and of the practice issue, plus awareness of a bundle of minor strategies and factors. The fact that wider experience in a certain mode of behaviour increases one's stock of strategies to cope with that behaviour is hardly surprising, however; hence no more generalisations will be made from the strategies and factors mentioned.

### 5.5.1.g Language type and learning

#### 5.5.1.g.i Cognacy and learnability: the dog that did not bark

The learning of languages outside our own Romance/Germanic group appears to be mainly linked to language-count (Factor Analysis 5.4.2.a): the more languages one knows, the more one is likely to have learnt an unusual one. Any other links are slight: an "exotic tastes" effect linking "exotic experience" in Class-Only and Solo/Mixed modes (*Solo/Mixed Exotic Experience* Discriminant Analysis data: 5.4.2.c.ii); and a greater tendency amongst Romance/Germanic learners to end up dropping classwork in favour of self-instruction. Cognacy to the mother tongue, therefore, appears to have relatively little effect on achievement - a surprise, since one might well have expected command or dropout effects with this distinction.

One reason might be that other languages known should also be seen as points of comparison (Literature Review 2.3.4). The *LANGUAGE-CONTRAST* protocols attest to comparisons and cross-influences on the L2 (i.e. the target language) from both English and L3s (5.4.4.d.v). When we look, however, for concrete L3 effects on achievement (albeit by admittedly quick-and-dirty methods: 5.4.3.d.ii), they are as minimal as mother-tongue effects. In other words, L3 effects define the problem more thoroughly, but do not solve it.

Before going further, it is worth asking whether learners even *perceive* different transfer/learnability opportunities with different language types. Here too, however, we have a dog that did not bark, or only whimpered (*Solo/Mixed Exotic Experience* Cross-Links: 5.4.5.c.ii)[78]. At best, intrinsic *Learnability* appears as only one of a large bundle of minor variables, each only distinguishing between a few ±Romance/Germanic learners; and both *Transfer* and the *LANGUAGE-CONTRAST* GROUP as a whole distinguish between no learners at all.

Before scrapping the proposed Language-Contrast section on the Checklist (3.2: Section 1), however, we should ask *why* the dog did not bark.

Firstly, the Learner-Profile and Individual-Language models lack a length-of-learning dimension. Thus less cognate languages might well take more learning hours to reach the same proficiency level. Unfortunately, though this solution appears appealing, we do not have the means to confirm or deny it.

The data does confirm, however, Oxford's finding (1989: Literature Review 2.4.3.c.iii) that non-Romance/Germanic languages are undertaken by generally more experienced language learners (Learner-Profile Factor Analysis 5.4.2.a), who have better *"EFFORT/PLANNING"* skills and clearer motivation to undertake what they do see as "hard work" (*Solo/Mixed Exotic Experience* Cross-Links: 5.4.5.c.ii) - presumably because one only learns such languages with a strong reason![79] This might well act as an effective counter-balance to cognacy/learnability problems with "exotic" languages.

A more intriguing explanation is that lexical cognacy and intrinsic grammatical simplicity may help some learners much more than others. Learners with a studial learning style, it seems, tend to use transfer strategies and to find their L2s intrinsically learnable (GROUP-Quality Factor Analysis, Factor 1: 5.4.4.b): hence, perhaps, the studial Diarist's search for pseudo-transfer strategies (etymology, keyword-imagery) for

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[78] In the Sherlock Holmes story "Silver Blaze", the fact that the guard-dog did not bark when the horse disappeared was the key clue: it meant that the dog knew the thief well.

[79] These indications tally very closely with the Diarist's real experience of learning Hungarian.

Hungarian vocabulary, and his unfazed attitude to Hungarian's complex grammar. Those with an experiential learning style, by contrast, tend to find new linguistic systems difficult, and transfer a source of interference. In any case, language-contrast effects are strongly mediated by individual learner factors: the protocol reports (5.4.4.d.v) show that transfer may simultaneously aid and hinder learning; and L1-cognate languages (German being the prime example) can be widely perceived as "difficult", and exotic languages (e.g. Japanese) enjoyed for the challenge they present.

Another factor is that of productive versus receptive skills. There is evidence that intrinsic ease and cognacy do help with the intensive receptive skills of reading and play-replay cassette listening (Factor Analysis 5.4.4.b: Factors 6 and 7; protocols 5.4.4.d.v). In overall proficiency judgements, however, as used in this survey, productive skills (especially speaking) tend to take primacy over receptive ones.

There could also be a psycholinguistic explanation: that cognacy links may be activated during low-speed, controlled-processing tasks. This is discussed in greater detail in 5.5.3.h below.

In the end, however, we must not discount learner perceptions because they do not have a clear grounding in philological fact. Let us not forget that *perceived* language ease and transferability, whatever their basis, have been identified as key predictors of a sense of success (*Solo/Mixed Failure Profile*: 5.4.5.d.ii; cf. Kellerman, 1983).

## 5.5.1.g.ii Other language-type effects

As may be expected, the non-Romance/Germanic learner does have problems with speaking (*Solo/Mixed Exotic Experience* Cross-Links: 5.4.5.c.ii). A more important problem with non-Romance/Germanic languages, however, is that the materials tend to be less well designed, scoring badly in general *USABILITY* terms. The biggest single process effect of non-Romance/Germanic experience, however, appears to be an awareness of the writing question. Learning non-Latin scripts will obviously increase such awareness; on the other hand, writing awareness has already been linked to general quantity of experience (Discussion 5.5.1.f). Moreover, the linkage can be two-way - adventurous or experienced language users can also be interested in finding out how the written system works (*WRITING* protocols: 5.4.4.f.i).

The raw *Language Name* figures (5.4.3.d.iii) show how strongly the Solo/Mixed language-learning experience tends to be experience of learning French - and, to a much lesser extent, of German, Spanish and Italian.

Finally, individual language types are strongly linked to initial learning means. This is perhaps to be expected, with class experience being virtually universal for French, widely available for the major European languages, but very hard to find in "minor" languages like Hungarian or Dutch. Availability of classes is not all, however: Italian classes are by no means thin on the ground, but all Italian learners in the sample started out by teaching themselves only.

### 5.5.1.h Environment

Length of stay in the L2 country is strongly linked to command (Factor Analyses 5.4.2.a, 5.4.3.a), especially at Individual-Language level. There are also indications that the negative verdict for self-instruction may apply more to study in one's mother country than in an L2 environment (see discussion 5.5.1.b.i above). The fact that residence may also predict eventual "retirement" from learning has been discussed in 5.5.1.e above.

In process terms, besides mentioning the L2 country more, those with high L2 country experience find more intrinsic interest in their learning materials, probably because of greater background knowledge and involvement with the foreign culture (*Solo/Mixed Maximum Country Experience* Cross-Links: 5.4.5.e.i). Those with little country experience, by contrast, tend to be more concerned about assessment and feedback: presumably those who have stay for longer periods in the L2 environment get to know their abilities fairly well, so feedback becomes less of an issue.

## 5.5.2 A note on gender

There is much evidence of a strong, socially-conditioned gender effect in British secondary and tertiary education, with girls opting for modern languages and boys opting out of them (Literature Review 2.4.2.a.ii). Evidence for an intrinsic female language-learning superiority, however, though anecdotally popular, is scant, though Oxford (1989) does report that women are slightly better strategy-users than men.

Though this study included gender only as a peripheral "just-in-case" variable, it makes an important contribution to the gender-and-language debate in that it largely circumvents social conditioning effects. By definition, self-instruction involves a deliberate choice for language study. With men, this involves rejecting (whether consciously or not) their teenage conditioning; and with less classwork, there is presumably less opportunity for them to resuscitate stereotypes by comparing themselves against women classmates.

Hence the comforting finding (for men, at any rate!) that there are virtually no achievement differences, and few clear subjective-experience differences, between men and women also indicates that any gender differences in language learning *are* more a product of nurture rather than nature. There is little evidence of innate differences between the two genders, which also makes good biological sense: if, as Steiner (1975) argues, bilingualism is more rule than exception in human evolutionary terms, it would be curious indeed if one half of the human race was significantly better at it than the other!

## 5.5.3 Open-ended self-reports: GROUPs and Keywords

### 5.5.3.a Introduction

The materials experiences, strategy reports and other factors cited as affecting learning cluster by *Quality* rather than *Mention* (Factor Analyses 5.4.4.b). This is welcome in research-methodology terms, as is the lack of cross-clustering between *Quality* and *Mention. Mentions* of individual GROUPs and Keywords have, of course, been found

to be important discriminants for certain Learner-Profile variables; but there appears to be no overall "articulacy effect" warping the Open-Ended findings. This means that we can concentrate, with a clear conscience, on the learners' advice and warnings per se.

The subjective-experience Factors isolated by the Analysis were, in order of importance:

1. Learning Style
2. Strategic Skill
3. Language Content
4. Heard Input
5. Published Package Use
6. Classwork and Motivation
7. Controlled-Speed Input
8. Good Language Learner
9. Multi-Track Learning

The first - Learning Style - is roughly twice as strong as the second, showing that it is a key factor in self-instructed language learning. Factors 2 to 9, however, tail off very gradually, with Factor 9 having roughly half the strength of Factor 2. Even Factor 1, however, only accounts for about 16% of general learner satisfaction, and one-third is unaccounted for by any Factor. Thus the picture sketched here is a complex one, and one with room for individual variation beyond the Factors in the model. Which is not unsurprising: the only clear finding to have emerged from the mass of SLA research in recent years is that there are many different roads to language-learning success (and failure). This too may have a biological base. Taking up the earlier argument about an "evolutionary imperative" to foreign language learning (Steiner, 1975), if about half of today's world population can function in another language (Harding & Riley, 1986) one would hardly expect a single ideal learning means that would suit all these learner personae, languages, settings and motivations.

The discussion below will follow the structure of the GROUP/Keyword Results Section (5.4.4): each Factor will first be looked at as a whole, and then from the point of view of its component GROUPs.

### 5.5.3.b Factor 1: Learning Style

#### 5.5.3.b.i General

Several authors have proposed learning style as an important variable in SLA (Literature Review 2.4.2.d). Factor 1 shows that learners fall, to a certain extent, along a cline between: successful use of speaking, feedback and people on the one hand; and successful use of metalinguistic descriptions and transfer strategies, plus the perception that one is learning an "easy" language on the other (Factor Analysis 5.4.4.b). This corresponds almost exactly to the experiential⇔studial cline of e.g. Ellis R. (1989). No evidence, however, was found for Meara's visual⇔verbal cline (1993). It is interesting that learning style is seen as the single most important Factor in self-instruction; this may also be true for classroom learning, though only a comparative study of the two modes could confirm this.

Ellis suggests that a "balanced cognitive orientation" may be better for acquisition than an extreme experiential or studial style. The present study, however, suggests that no point on the scale is ideal: for a learner to be good at both styles, each style would have had to be assigned to a different Factor, which was not the case. Being good at experiential learning, therefore, implies problems with studial learning, and vice versa; but having a "balanced orientation", i.e. scoring mid-way on the Factor, means one will probably have a mixture of good and bad experiences in both styles!

This is a somewhat sobering finding, implying that the "good language learner" with both studial and experiential talents (cf. Literature Review 2 4.3.c.ii) is a bird more cited than sighted. Instead, maybe good language learners are people who are good at exploiting the advantages of their learning style, and compensating for its disadvantages in other ways - there are, after all, eight other significant Factors, and none of these are double-edged.

Good transfer and L2 learnability experiences (studial style) are linked to perceived success, and good speaking experiences (experiential style) to high command (Cross-Links 5.4.5.d.ii-iii; cf. Discussion 5.5.1.c-d above). Whether the experiences cause, or are caused by, the achievements is hard to answer: it could well work both ways. But there is no evidence that one learning style is intrinsically superior to another, as a few

authors claim (usually, like Oxford - 1989 - favouring experiential above studial style, even in the face of their own evidence to the contrary: Literature Review 2.4.3.c.ii). What one can say is that experiential style gives a higher sense of proficiency (implying that proficiency is primarily judged in communicative-ability terms, which is likely), whereas studial style gives a higher sense of success (implying that success is primarily judged in terms of "cracking the code", which is also appealing). Other authors do in fact take such a value-neutral attitude to learning style: Ellis R. (1989), say, or O'Malley & Chamot (1990).

Ellis suggests that teaching which forces learners to use the "wrong" learning style may be counter-productive. This seems to be confirmed by this study: the protocols contain a good number of learner complaints at both over- and under-explicitness (*GRAMMAR* protocols: 5.4.4.e.iii), or debates between the rival merits of inductive and deductive presentation (*STRATEGIES* protocols: 5.4.4.e.i). Nevertheless, self-instructed learners have more freedom than class students to find an input means that best suits their learning style, or to cull the best aspects from two different sources (*MULTIPLE* protocols: 5.4.4.m.i). Indeed, an important benefit of Mixed-Means learning, as learners imply, is that they can keep the advantages of classroom learning whilst adding an fully-autonomous/materials-led self-instruction element more suited to their own learning style.

The Diarist identifies himself as a studial learner (4.1.3.b); with his metalanguage skills and concern with cognacy and L2-internal transfer issues, the main study indicates that this is probably an accurate judgement. Indeed, his perception of a lexical threshold which enables "internal transfer" (i.e. the use of L2 etymology as a learning strategy) may only be generalisable to learners who share his learning style. A "real-text" threshold, however, may well be experienced by both learning styles - perhaps a reason why it is mentioned more in the literature (Literature Review 2.3.5)[80].

The composition of the studial style - metalanguage-handling plus transfer and system-decoding (*Learnability* Keyword) skills - is in itself uncontroversial. More interesting

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[80] Though the dominance of English, with its highly heterogeneous lexicon, as the paradigmatic L2 in language-acquisition research presumably also plays a role here.

from an SLA-theory point of view, perhaps, is the composition of the experiential style: speaking and people, but also feedback and assessment. This seems to endorse the growing view that real-time monitoring of output and replies from one's interlocutor is an important acquisition means (Morrison and Low, 1983; contrast Krashen, 1985).

The data, however, implies that monitoring of oral input and output is not an absolute good, as some authors claim (e.g. Ellis R., 1990), but rather an experiential (or "function-focused") acquisition technique best suited to learners with an experiential learning style. Those with a strongly studial (or "form-focused") learning style, by contrast, are likely to find learning by speaking + monitoring problematic, or to complain about its lack (perhaps because they are less skilled or confident at making the necessary personal contacts). On the other hand, studial learners seem to compensate for these defects by analytic work on language form - which is where experiential learners have problems.

The component GROUPs of the Factor will now be looked at in more detail.

### 5.5.3.b.ii ASSESSMENT

The necessity for assessment, feedback and getting a sense of progress tends to be cited more in the self-instruction literature (e.g. Dickinson 1987, Doyle and Meara 1990) than in the general SLA literature. The present study underlines the importance of these features in self-instructed learning: the ASSESSMENT GROUP is the strongest in the Factor Analysis as a whole (Table 5.4.4/i). Learners are aware of the importance of feedback and the motivating power of a sense of progress; and they report a good range of strategies, formal and informal, from self and others, for getting this (protocols: 5.4.4.d.i).

An ultimate purpose of the present study is to generate advice which can be passed on to other learners through self-instruction training. With training in Factor 1 strategies in particular, however, the trainee's learning-style will have to be taken into account: thus formal target-setting, translating plus dictionary checks, etc. may suit the more studial learner, and informal feedback from interactive conversation may suit the more experiential learner. This assumes, however, that there *is* a sort of feedback that suits

the extreme studial learner - which, from the evidence here, is not the safest of assumptions.

### 5.5.3.b.iii *SPEAKING*

Lack of speaking practice might seem to be the central defect of self-instruction. This need not be the case, however. Self-instruction need not rule out interactive speaking: besides having a classwork strand to their learning, interviewees mention the use of native speakers, L2 country visits and study buddies (*SPEAKING, PEOPLE* protocols: 5.4.4.d.ii-iii). Controlled, solo activities such as repetition and filling in gapped tape dialogues are also cited, usually favourably - which shows, slightly unexpectedly, that even lack of interaction need not be a barrier to getting speaking practice. Several learners reported embarrassment at speaking to a cassette, however; thus controlled speaking activities appear to be more suited to private spaces (e.g. one's car) than public ones (e.g. a language lab).

Interviewees also show a range of pronunciation-learning strategies, all of which could serve as input to learner training. Beside the predictable emphasis on cassette repetition, there were also mentions of the role of informal conversation, informants, dictionary work, and phonetic descriptions (though opinions on the usability of the last-named were divided).

### 5.5.3.b.iv *PEOPLE*

A wide variety of people and L2-environment strategies is reported (protocols 5.4.4.d.iii), showing that the recommendations of the self-instructed literature (e.g. study buddies: Dickinson 1987, Doyle & Meara 1991) are well grounded in actual learner behaviour. Indeed, some of the techniques used - such as visiting L2 churches and restaurants in Britain, or language learning as a family enterprise - have not, to the best of my knowledge, been mentioned elsewhere.

Many methodologists would see real-life interaction with native speakers as an absolute learning good. The interviewees, however, warn that "naive" native speakers may be hard to understand, native speakers' competence may be so daunting that the learner does not have the confidence to approach them, or native speakers may prefer to use

another language that the learner knows better. The learner's proficiency level is likely to be crucial here: after "threshold level", she is likely to understand native speakers, and thus have more confidence to open conversations and to insist on L2 use. In any case, strategy training programmes will have to take account of this.

### 5.5.3.b.v *METALANGUAGE*

The protocols (5.4.4.d.iv) provide clear lessons for materials writers. Explicitness and clarity are the two prized features; conversely, lack of coverage and "difficulty" (which can also include excessive coverage) are complained at. The mother tongue, it seems, should be retained for language explanations, but there are arguments for introducing the L2 for instructions. There is little support for iconic symbols, which fail on the clarity criterion (cf. Figure 3.3.1/iii).

### 5.5.3.b.vi *LANGUAGE-CONTRAST*

These variables - the *Transfer* and *Learnability* Keywords - have already been discussed in 5.5.1.g and 5.5.3.b.i. above.

## 5.5.3.c Factor 2: Strategic Skill

### 5.5.3.c.i General

At first sight, this is rather a mixed bag, combining *PEOPLE* and L2 settings with mixed *STRATEGIES*, materials and equipment *USABILITY*, package *COMPONENTS*, and *GRAMMAR*. One test of whether this "Strategic Skill" Factor has been correctly named is to compare it with taxonomies in the learning-strategy literature. Table 5.5.3/i below attempts to match the underlying Keywords of the Factor 2 GROUPs (Tables 5.4.4.e) against the learning-strategies identified in the literature (Literature Review 2.4.3.c.i). The groupings are taken from Oxford (1989)[81] - all except the last category, "materials-handling", which will be explained below. The rightmost (⇨) column gives,

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[81] I have omitted her "compensatory" grouping, as this refers to what most authors classify as communication strategies.

for each Keyword, one author who cites the Keyword as strategic and as belonging to the grouping in question[82].

**Table 5.5.3/i**

**Factor 2 ("Strategic Skill") Keywords vs. learning strategies cited in the literature**

| Strategy groupings | Factor 2 Keywords | ⇨ Keyword cited as a learning strategy by e.g.: |
|---|---|---|
| metacognitive | (not assigned to Factor 2; cf.: <br> ★ Factor 1: *ASSESSMENT* <br> ★ Factors 6 & 8: *EFFORT/ PLANNING*) | ⇨ Oxford (1989) <br> ⇨ Oxford (1989) |
| affective | (none) | |
| social | ★ *NativeSpeakers, Country, Community* <br><br><br><br> ★ *StudyBuddy* <br> ★ *Informant* | ⇨ Naiman *et al* (1978): seeking contact with target-language speakers <br> ⇨ Oxford (1989) <br> ⇨ Oxford (1989): asking questions |
| memory | ★ *Memorisation* <br> ★ *KeywordImagery* <br> ★ *Revision, RepeatedTask* <br><br> ★ *Repetition* | ⇨ Rubin, 1981 <br> ⇨ Oxford (1989) <br> ⇨ Oxford (1989): structured review <br> ⇨ O'Malley & Chamot (1990) |
| cognitive | ★ *Grammar, Etymology* <br><br><br> ★ *Grammarbook, VocabBook, Dictionary, ReferenceValue* <br> ★ *Notetaking* <br><br> ★ *Inductive, Deductive* <br><br> ★ *ThinkingInL2* <br><br> ★ *Teaching* | ⇨ Naiman *et al* (1978): analysis of the target language <br> ⇨ O'Malley & Chamot (1990): resourcing <br> ⇨ O'Malley & Chamot (1990) <br> ⇨ O'Malley & Chamot (1990) <br> ⇨ O'Malley & Chamot (1990): rehearsal <br> (none known) <br><br> (none known) |
| "materials-handling" | ★ *CourseCassette, CourseVideo, CourseBroadcasts, Call* <br> ★ *Clarity/Structure, Usability, Obtainability, Expense, Legibility* | (none known) <br><br> (none known) |

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[82] Other authors, of course, may also cite the strategy in question.

Thus Factor 2 equates very closely to existing strategy taxonomies. All the Keywords belonging to the *PEOPLE* and *GRAMMAR* GROUPs are identified as strategic in the literature, as are all the *STRATEGIES* Keywords except for *Teaching* the L2 - which would seem fairly uncontroversial to regard as a cognitive strategy.

The present Factor Analysis, however, adds various riders to this equation. The use of people/L2 settings, it seems, is not only strategic. The fact that the *PEOPLE* GROUP is also in the experiential half of Factor 1 implies that people/L2 settings also have a skill-specific aspect, i.e. as partners/venues for speaking practice (cf. Discussion 5.5.3.b above).

Grammar is present both here and in Language Content (Factor 3), implying that it too has a dual role: its learning is driven both by general strategic skills (the present Factor) and by a separate, writing-linked ability to tackle the "nuts-and-bolts" of language (Factor 3: see 5.5.3.d.i below).

Two whole GROUPs included in Factor 2 do not seem to appear in the learning-strategies literature: package *COMPONENTS* (*CourseCassette*, *CourseVideo*, etc.) - except that *Grammarbook* and *VocabBook* are seen as cognitive "resourcing" strategies by O'Malley & Chamot (1990); and package *USABILITY* judgements (Keywords *Clarity/Structure, Usability, Obtainability*, etc.). They do perhaps operate on a slightly different level than the more autonomous strategies in the list above: *COMPONENTS* are the wood, as it were, that the autonomous-strategy tools work on, and *USABILITY* assesses the suitability of the wood to be worked. Hence they have been added to the Table above as "materials-handling" strategies.

The skill-specific strategies and materials (*READING, SPEAKING*, etc.) are not included in this Factor. This points to their being controlled by different, more specialised skills than the "all-round" social, memory/cognitive and materials-handling skills of Factor 2.

Also absent from this Factor are the "metacognitive" strategies of self-evaluation and planning (Oxford 1989, O'Malley & Chamot 1990). The former, corresponding to the

*ASSESSMENT* GROUP, falls under Factor 1 (Learning Style), while the latter, corresponding largely to *EFFORT/PLANNING*, falls under Factors 6 (Classwork and Motivation) and 8 (Good Language Learner). In other words, the present model sees metacognitive strategies as operating at a different level from the social/memory/ cognitive/materials-handing strategies clustered here. Assessment/feedback and effort/ planning are at least partly in thrall to the psychological characteristics of learning style and aptitude/self-discipline respectively. In addition, the assignment of assessment/ feedback and effort/planning to different Factors suggests that, though conventionally lumped together as "metacognitive strategies", they have little in common.

The "affective strategies" cited by several authors - self-encouragement, anxiety reduction, etc. - were not mentioned by the learners. Affect and attitude appear as part of Factor 6; but interviewees did not describe them as strategic, i.e. guideable by intentional acts. Thus, on present evidence, there is probably little point in training learners in "overcoming inhibition" or "anxiety reduction" strategies. On the other hand, raising awareness of affective obstacles as a prelude to training in compensatory strategies - such as researching and rehearsing a speech-event script before the actual encounter (*ThinkingInL2*: protocols 5.4.4.e.i) - may well be useful.

Two individual techniques defined as strategic in the literature were assigned to other Factors. One is language transfer, which, as the *LANGUAGE-CONTRAST* GROUP, participates in a number of learning processes (Factors 1, 6, 7); as has been discussed, it seems to operate rather differently from other strategies. The other is translation; the fact that this was not involved in Factor 2 is probably a taxonomic artefact (the *Translation* Keyword was assigned to the *PRACTICE* rather than the *STRATEGIES* GROUP, though it turned out in the end to be mainly autonomously-driven, and thus more strategic in nature).

The GROUPs here are involved in various achievement predictions - all in terms of Mention rather than Quality. Miscellaneous *STRATEGIES* are linked to low class-only experience (Cross-Links 5.4.5.b.i), *PEOPLE* to mixed success/failure ratings (i.e. experience plus self-criticism: Cross-Links 5.4.5.d.ii), and *COMPONENTS* to self-instruction-first learning means, low self-instructed command and mixed dropout ratings (Cross-Links 5.4.5.d). Solo strategy use, it appears, is not an absolute good, as

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the much recent literature implies, but more a way of coping with solo learning tasks. Such tasks are hard: these "achievement" features are more concerned with struggling forwards than with reaching satisfying goals. In other words, the prime role of this "Strategic Skill" Factor might be to power the "long, hard slog" up to threshold level without a teacher; if so, this might also imply that certain other Factors (e.g. Heard Input: cf. 5.5.3.e below) would only switch in after the real-text threshold.

Specific GROUP features will now be looked at; *PEOPLE*, however, has already been discussed in 5.5.3.b.iv above.

### 5.5.3.c.ii Miscellaneous *STRATEGIES*

Here, the protocol extracts (5.4.4.e.i) speak largely for themselves. To add a few notes:

Learners are divided in their preference for inductive vs. deductive input: learning or cognitive style (Literature Review 2.4.2.d) could well determine preference here. Grammar presentations, however, are expected to be deductive.

Dictionaries used are solely bilingual. There is scope for learner training in effective dictionary use strategies, both bilingual and monolingual. If a corpus of activities is to be developed, however, textbook writers and methodologists first need to discard the "monolingual-is-best" myth (Literature Review 2.6.2.b). I know of no published bilingual dictionary training activities (contrast e.g. Whitcut, 1979 for monolingual dictionaries); thus suggestions by this study's interviewees would be useful in developing such a corpus. One of the most immediate benefits of discarding this myth, however, would be the reintroduction of two-way bilingual glossaries into coursebooks (cf. Checklist discussion 3.3.1.a).

The usefulness of overt memorisation (Literature Review 2.5.3.d.iv) is also largely ignored in contemporary FL methodology - perhaps because of an understandable reluctance to advertise language learning as a process that involves hard work as well as enjoyment. Many learners, however, both in the present project (the interviewees and the Diarist) and in other learning-strategy studies (2.4.3.c), recognise that memorisation of lexis is an irksome but near-indispensable strategy, especially in the earlier phase of

learning. In default of published recommendations, the interviewees' tips can form a good basis for training.

Keyword-imagery appears to be an occasional rather than a central strategy, probably because it requires a relatively large amount of conscious attention, and perhaps also because it suits a certain "visually-oriented" type of learner (cf. Meara, 1993). L2-internal etymology is also a low-frequency technique, only being mentioned by the Diarist (4.2.1.a) and two interviewees; this strategy, by contrast, may be better suited to the more studial learner. Nevertheless, it should do learners no harm, and some of them some good, to be introduced to both techniques.

### 5.5.3.c.iii *GRAMMAR*

The main thing to emerge from the protocols is a liking for explicit grammar explanations and a moderate (though not excessive) amount of controlled exercises: translation, substitution, etc. Avoidance of grammar usually gets the thumbs-down, though not all learners feel that grammar should be tackled at the very outset of learning. Learners are aware of the need for message-based as well as controlled work.

The lesson for materials writers, perhaps, is not to avoid or hide grammar, but to teach it explicitly, with a combination of clear explanations, controlled exercises and message-based activities - but without letting the coverage become excessive.

### 5.5.3.c.iv Package *COMPONENTS* and *USABILITY*

Cassettes seem to be the *sine qua non* of the language-learning package, especially as they are usable virtually anywhere (cf. the Diarist's problems through lack of course cassettes: 4.2.8). Videos, though they provide richer input, can be more difficult to use - because of competition for the family video player, say.

Clear structuring, thorough coverage, and reference usability are valued: this is often a reason for the more traditional textbooks, such as the (pre-1990s) *Teach-Yourself* series, to be highly rated (cf. Checklist Findings 3.3.1.a).

Expense is a key factor for many learners (cf. Literature Review 2.5.3.a.i).

## 5.5.3.d Factor 3: Language Content

### 5.5.3.d.i General

Factor 3 links *WRITING* with *VOCABULARY* and, to a lesser extent, *GRAMMAR*. The merging of grammar with vocabulary implies that there is an ability, distinct from the learning style and strategic coping techniques discussed so far, to cope with the "nuts and bolts" of language. In linguistic-theory terms, these findings seem to support models such as that of Halliday (Literature Review 2.3.2.b), which see the lexicon and the grammar as two aspects of the same single "lexicogrammatical" system. Some (e.g. Willis, 1990) go even further, advocating a complete merging of the two sub-systems; the interviewees, however, retain them as two distinct concepts, with distinct approaches to learning. Nevertheless, the fact that they belong at least partly to the same Factor implies a large overlap in learning technique or ability.

The strongest of the three elements in the Factor, however, is *writing*. This indicates that writing is the key vehicle for acquiring the lexicogrammar, through note-taking, controlled exercises, open-ended writing tasks, etc. (*GRAMMAR, WRITING, VOCABULARY* protocols: 5.4.4.e.iii, 5.4.4.f.i-ii) - though grammar learning is also helped by general strategic ability (Factor 2). It also implies that the learner who is oriented towards learning writing systems is also good at, and enjoys, tackling lexis and grammar.

Awareness of writing is strongly linked to quantitative language experience (*Class-Only* and *Solo/Mixed Exotic Experience* Cross-Links 5.4.5.b.i, 5.4.5.c.ii; *Total* and *Solo/ Mixed Language Count* Cross-Links: 5.4.5.b.iv, 5.4.5.c.i), though grammar and vocabulary do not participate in this link in any strength. This indicates that the type of writing that helps lexicogrammatical development may be different from that which is linked to wider language-learning experience. In the former, perhaps, writing is a relatively low-level means of practising individual items and structures; in the latter, by contrast, wider experience of languages brings an awareness of the variety of writing systems in world languages, and the different strategies needed to tackle them. The only other achievement Cross-Link for this Factor is that between vocabulary and initial

learning means, indicating learner dissatisfaction with self-instruction package lexical content (discussed in 5.5.1.b.i).

GROUP-specific comments now follow; for grammar, however, see 5.5.3.c.iii above.

### 5.5.3.d.ii WRITING

Writing experiences are almost wholly positive (raw data and protocols 5.4.4.f.i). Reading and dictionaries are mentioned as input sources, and a good variety of autonomous practice activities are mentioned, even extending to making and solving one's own word-games and puzzles.

Irregular orthographies were generally disliked, for obvious reasons. Ideographic characters, however, were found mind-boggling and fascinating in equal measure. The use of keyword-imagery cartoons for teaching non-European characters, approvingly mentioned by one learner, could, it seems, be used more widely by course packages. One of the books surveyed for the Packages Checklist (*Fun With Chinese Characters*) is especially appealing in this respect:

Figure 5.5.3/ii: Keyword-Imagery for Chinese Characters (Tan, 1980)
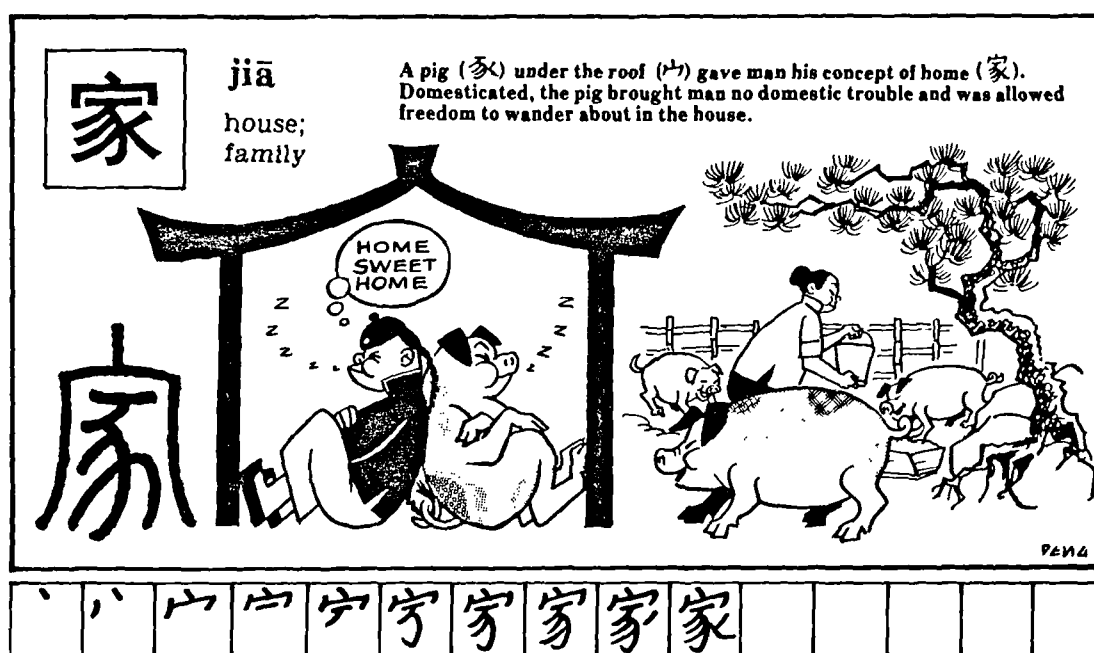
<u>5.5.3.d.iii *VOCABULARY*</u>

Several recommendations for materials-designers emerge from the protocols (5.4.4.f.ii). Recycle lexical input. Have enough, but not too much lexis (cf. Meara, unpubl.). Have two-way bilingual glossaries in coursebooks (cf. dictionaries discussion above: 5.5.3.c.ii). The crucial question of datedness/appropriacy of target lexis is discussed in 5.5.1.b.i above.

The protocols show a wide variety of lexis-learning strategies, many of which can be recycled for learner training purposes.

## 5.5.3.e Factor 4: Heard Input

<u>5.5.3.e.i General</u>

This combines *LISTENING* skills, *INPUT* and *ENJOYABILITY* (Factor Analysis 5.4.4.b). The combination seems uncontroversial, though the fact that enjoyability is linked to good listening (and to good packages - Factor 5) rather than other aspects of the self-instruction experience is interesting.

Authentic materials score highly for intrinsic interest - at least, for those able to use them. Inexperience, by contrast, both in terms of low language counts and low maximum command, is significantly linked to *LISTENING* problems (Cross-Links: 5.4.5.b.iv, 5.4.5.c.i, 5.4.5.d.iii). The protocols (5.4.4.g) add that such learners find real-life listening and package-based authentic texts too difficult (probably through low proficiency), and/or find non-authentic package texts repetitive and boring (perhaps through narrowness of experience).

The fact that input and listening are separated from aspects that might have been thought to be related - such as the Strategic Skill Factor, the people/speaking sub-group (Factor 1: Learning Style), or reading - implies that we are dealing with an ability first to cope with, and then to profit from and enjoy, a certain type of input. This ability appears to be not particularly strategy-mediated, or linked to interaction with people: the key element seems to be the input characteristics of the text per se, such as difficulty

level, authenticity and speed - relative, of course to the learner's proficiency. With reading, strategies such as slowing the pace, re-reading and dictionary look-up can reduce text-intrinsic difficulties; and skimming (or skipping!) lets one cope with over-easy texts. With listening, however, one is forced to cope, willy-nilly, with the text in real time: hence learner:text level mismatches can easily occur, especially at the pre-threshold stage. Higher (i.e. post-threshold) command, by contrast, lets one get much more pleasure out of listening because one can switch to intrinsically-enjoyable real-people and authentic-text sources (protocols 5.4.4.g.i). Experience of more languages makes one worry about the listening problem less - though this lack of worry was the Diarist's undoing (4.2.8): more effort to find cassettes might have made native-speaker input a bit less of a shock!

Learners make a key contribution to this debate by distinguishing between "authentic" (ungraded, non-pedagogic, native-speaker input) and "realistic" (an accurate but assimilable approximation of real-life usage): at lower levels, the former can be problematic, but the latter is a near-vital criterion (INPUT protocols: 5.4.4.g.i). Package listening texts, which are used primarily by pre-threshold learners, should therefore be graded, but realistic and intrinsically interesting. Fully-authentic texts would seem to come into their own after the real-text threshold - though there is perhaps a role at lower levels for very short, authentic extracts recycling target items (thus counteracting the speed and level problems cited by learners).

The use of the rewind button, it may be argued, makes cassette listening much more like reading. This is almost certainly so, as is shown by the marriage of tape playback TECHNOLOGY to USABILITY and READING in Factor 7 (Controlled-Speed Input). Their assignment to a different Factor from the present one implies, however, that real-time and user-controlled input involve two very different skills.

Variety (of topics, but also voices) and intrinsic interest are the key aspects of enjoyability in listened input (LISTENING protocols: 5.4.4.g.ii): this implies that language centres should provide a wide range of both simplified and authentic materials, and that package designers should try to incorporate variety into their listening texts.

Other points specific to the GROUPs are looked at below.

### 5.5.3.e.ii *LISTENING* and *INPUT*

Listened input, despite its problematic aspects, is seen as vital at all levels (cf. the Diarist's problems: 4.2.8), and lack of listening materials is a frequent complaint. Most courses published at present do have cassette materials, often available separately from the book; if so, failing to buy them would appear to be false economy on the part of the learner. If language centres possess packages in "minor" languages without (or with poor) listening materials, it is probably worth asking native speakers (if they can be found) to make recordings, perhaps with worksheets, to accompany the coursebook.

The traditional device of "dialogues" is liked as a means of supplying structured input (protocols 5.4.4.g.i), as are comprehension questions.

Written transcripts are appreciated at all levels. Providing not only a wide, frequently-updated range of recordings, but also transcripts for them all, is almost certainly an impossible task for a language centre; but package publishers are well able to provide transcripts for their listening materials. Opinions on video subtitles, by contrast, are divided - they can help understanding, but also render the listening skill redundant. They are perhaps best avoided, and replaced by printed transcripts.

Videos themselves are generally liked - though, as already mentioned, playback equipment may be hard to find; and some learners also report that the pictures distract them from focusing on listening itself (protocols: 5.4.4.g.ii-iii).

### 5.5.3.f Factor 5: Published Package Use

This Factor is the fifth most important, accounting for only 6.5% of sample variance: packages, it seems, are not as central to the self-instruction process as was assumed at the outset of this project. They do appear vital for the first phase of learning, but even before the real-text threshold, package work is often paralleled by autonomous work; and after the threshold, nearly all self-instruction work is autonomous.

The Packages Checklist Chapter (3.4) ended with two questions:

★ Do other learners share the researcher's view that teach-yourself packages vary in quality (rather than being all hopelessly primitive), and that they are best defined in terms of good vs. bad package features than good vs. bad packages?

★ Are packages an effective and/or efficient learning means?

The answer to the first question, it would seem, is "yes". Learners see packages as a vital part of (pre-threshold) self-instruction; and their judgements tend to be in terms of a package's individual features ("Package X is good as regards A but not as regards B") - hence their frequent recourse, as with the Diarist, to multiple package use (5.4.4.m).

The answer to the second is much less positive. The problems with ab initio self-instruction, however, seem to lie not so much with package design as with the very nature of teacherless language learning at low proficiency levels. The best advice to an ab initio teach-yourself learner, it would seem, is "Don't". But what if she, through choice or necessity, cannot find a suitable class? It would seem vital at least to lessen the odds by making sure that packages have as many as possible of the "good" features identified in this project: in other words, well-designed tools are even more vital if one has a difficult job to tackle.

This Factor associates published packages with enjoyability and quality of practice - the latter, it seems, being a key criterion on which packages are judged (though the link is relatively weak: practice can come from other means). Awareness of the *PRACTICE* category, however, as well as good-quality practice, is linked to breadth of self-instructed experience, especially if a variety of initial learning modes has been used (*Solo/Mixed Language Count* and *Initial Learning-Means Profile* Cross-Links: 5.4.5.c.i, 5.4.5.d.i).

On the evidence of this Factor, therefore, a well-designed package should be enjoyable, and provide a good range of practice activities. In view of the high dropout risk with ab initio self-instruction, enjoyability appears vital in terms of helping to keep the pre-threshold learner on task. Enjoyability (protocols 5.4.4.g.iii) is glossed by learners as up-to-date, colloquial in language content, humorous (though some object to

frivolity: there's no pleasing everyone!), intellectually challenging - and, most frequently of all, not boring. Texts should be intrinsically interesting (another point where it is difficult to cater to everyone's tastes). The need for plenty of good-quality practice ties in with the skill-getting needs of the pre-threshold learner.

Controlled practice activities that are enjoyed are translation, gapped speaking and writing - implying that all should be integrated into published courses (protocols 5.4.4.h.ii). The very positive ratings for translation activities concur with a minority but growing view amongst methodologists (Literature Review 2.5.3.d.iii, v) that translation is useful as a language-learning tool. The fact that all translation citations are autonomous, however, shows how far it has fallen out of favour as a coursebook exercise.

Learners also point out that too much controlled practice can become monotonous, especially if the exercises tend to follow the same pattern. There is a need, in other words, for free, message-based practice, which should ideally include interpersonal interaction. It is at the latter point at which many packages fall down - though some, especially the BBC courses, which dominate learner citations, appear to be making honourable efforts to overcome this deficiency (cf. Checklist survey 3.3.1.a). It may well be, however, that the deficiency cannot be overcome within the confines of the package - i.e. that the coursebook needs to recommend learners to go out and find native speakers or study buddies (something which few coursebooks do at present: Checklist 3.3.1.a).

Package design, of course, need not be restricted to the features in this Factor - in fact, the totality of insights from this project should act as input to the package design process. Moreover, no package publisher or series comes in for overwhelming praise or blame by learners, thus strengthening the finding from the Checklist survey (3.3.1) that both up-to-date and more traditional packages have their strengths as well as their failings. In other words, materials designers can learn from the strengths of both modern and older packages.

### 5.5.3.g Factor 6: Classwork and Motivation

In statistical terms, *CLASSWORK* is this Factor's centre of gravity (Factor Analysis 5.4.4.b), though the presence of motivation - a key learner concern - is far from insignificant. Some learners cite classwork as a *MOTIVATOR*, though it is by no means the only one (protocols 5.4.4.j.ii).

Discipline and routine-setting (the metacognitive *EFFORT/PLANNING* group) has already been stressed as a key advantage of classwork (discussion 5.5.1.b). The fact that the contribution of *EFFORT/PLANNING* to the Factor is statistically slight (5.4.4.b) is probably due to the fact that it has two different aspects: externally-imposed organisation (this Factor), and internal qualities (Factor 8: Good Language Learner).

*READING* and *LANGUAGE-CONTRAST* have exactly the same values on this and the following Factor (Controlled-Speed Input), implying that they act as a unit, describing transfer strategies for reading and/or good reading experiences in "easy" languages. Here, the motivational aspect of the cluster seems to be explored, whereas the following Factor assesses the cluster as a supplier of input.

So what, then, is the common link between all these GROUPs? Superficially, we seem to be dealing with a bundle of influences external to the self-instruction process. They are largely also external to the learner. She is the recipient, not the creator, of the advantages of classwork, with externally-imposed discipline as one of its chief benefits. Motivation, which includes the vital question of the learner's need for the L2, derives largely from situation-specific factors; and language-contrast (learnability and transfer) is based on the features of the language itself.

On the other hand, certain of the *MOTIVATOR* Keywords concern the affective relationship between learner and learning process: self-*Confidence*, language *Learning-Pleasure*, liking for the L2 *Culture*, and *Expectations* of learning. These could perhaps be at the root of a liking for L2 reading; and though reading is aided by transfer/ learnability experiences, the latter have themselves turned out to be partially dependent on learner-internal characteristics.

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This Factor, therefore, seems to express the way in which the learner's attitude and personality integrates elements seemingly external to the self-instructed learning process. Moreover, this attitude/personality dimension appears distinct from the two other dimensions of learner psychology isolated in this model: learning style (Factor 1) and perceived aptitude (Factor 8). Such a three-way split, between affect/personality, learning style and aptitude is broadly in accordance with existing learner-psychology models (cf. Literature Review 2.4.2). Though the present study does not distinguish between affect and personality, this is perhaps as much an effect of experimental design as anything else: a study focusing on learner-individual factors per se might well have come up with finer distinctions.

The Factor is one of the few with statistical links to high achievement. Good motivation and good transferability/learnability perceptions are the twin predictors of a sense of success (*Solo/Mixed Failure Profile* Cross-Links: 5.4.5.d.ii) - which also seems to have more to do with learner attitudes than anything else (discussion 5.5.1.c). Effort/ planning skills appear needed to achieve high command and learn "exotic" languages (*Solo/Mixed Exotic Experience, Solo/Mixed Maximum Command* Cross-Links: 5.4.5.c.ii, 5.4.5.d.iii); and though actual citations of *CLASSWORK* by learners are not linked to achievement, the presence of classwork in the learning project is a key influence on both perceived success and high command.

### 5.5.3.h Factor 7: Controlled-Speed Input

This Factor (cf. Factor Analysis 5.4.4.b) centres around playback equipment use (mainly language labs), with a reappearance of usability and the reading/language-contrast cluster. With language lab listening, like reading, there is the opportunity to recap, to stop and note down key vocabulary, answer comprehension questions, etc. Thus the theme appears to be one of repeatable input for learning purposes - as opposed to Factor 4 (5.5.3.e), which appears to have more to do with coping with full-speed input, or Factor 6 (5.5.3.g), which looks more at the affective/motivational side of reading input.

Transfer strategies appear to play a role in aiding comprehension in both reading and listening (*LANGUAGE-CONTRAST* protocols 5.4.4.d.v). Carroll (1992) speculates that cognacy links involve automatic recognition processes. The present research, however, by grouping cognacy links with slow rather than full-speed input, implies that the activation of mental cognacy links is a cognitively-mediated, "controlled" process (*"Habitación* must have something to do with inhabiting... oh yes - it means *room"*) rather than an automatic one (cf. Literature Review 2.3.2.d). This also ties in with the linkage of transfer strategies with studial learning style, which is by definition a cognitive approach to learning tasks.

There are a few Cross-Links between component GROUPs and achievement, which have already been discussed: the language-contrast:success link and the poor usability:exotic languages link (5.5.1.c, 5.5.1.g.ii). They do not form a coherent overall picture.

### 5.5.3.j Factor 8: Good Language Learner

This unites personal language-aptitude ratings with the ability to cope with course input gradient and a reappearance of discipline/effort/planning skills (Factor Analysis 5.4.4.b). It is interesting that aptitude (or, more often, lack of it) is associated with the metacognitive strategies of finding time, self-discipline, routine-setting, capacity for hard work, goal-setting, etc. Though it is probably going too far to claim that the two are synonymous, what is popularly thought of as "a gift for languages" does appear to have a large element of organisational skill and plain hard work, at least in self-instructed mode. As already mentioned, we are almost certainly dealing with self-discipline here, rather than the externally imposed discipline of Factor 6 (5.5.3.g)[83].

These elements are linked with the ability to cope with package/unit length, pace and input gradient. It appears that a third "good language learner" talent is adaptability of

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[83] A methodological note: though modesty on the part of learners might have given exaggeratedly problematic self-assessments on both variables, it should not have warped their inter-correlation.

one's personal pace to that set by the course - or that aptitude and self-organisation are a key factor in coping with course input pace, gradient, etc. Good experiences of this *"PACING"* GROUP correlate with a tendency to self-instruction-first learning means (Cross-Links 5.4.5.d.i) - in other words, the ability to cope with input pace and gradient is a key element of "package-wiseness". The protocols (5.4.4.l.i) add that new-input gradient should obviously be neither too steep nor too gentle. Shorter activities and units tend to be preferred, because they give a better sense of pace and overall progress.

This Factor, therefore, seems to define "self-instruction aptitude", especially at pre-threshold level, perhaps: an ability to cope with the pace set by course packages, good self-organisation, and language-learning aptitude in the abstract. This "self-instruction wiseness" echoes Skehan's two factors in second-language aptitude (1986): innate linguistic ability, plus "classroom-wiseness", i.e. the ability to cope with decontextualized classroom input (here, *PACING* is perhaps the ability to cope with decontextualised package input). The present model adds a third element, however: the organisation needed to cope without a classroom.

### 5.5.3.k Factor 9: Multi-Track Learning

This is a single-GROUP Factor. It isolates the technique - which should probably be seen as a metacognitive strategy - of using several learning means (classwork, self-instruction, naturalistic) or several learning packages in parallel or sequence. It also looks at issues to do with the fit of different components within a package. It is moderately related to *Solo/Mixed Failure Profile* in that good experiences point towards the "experienced realist" languages vary and/or so-so category, and poor experiences towards all-failed (Cross-Links 5.4.5.d.ii).

The protocols (5.4.4.m) concur with this and the learning-means findings (5.5.1.b) by strongly supporting the combination of self-instruction with classwork, self-instruction with naturalistic means, and multiple package/materials use. They are more equivocal, however, as to whether different package components - e.g. cassette and coursebook - should aim to complement or duplicate each other.

# 5.6 Summary of Language Experience Survey Findings

Foreign-language learning - like the learning of most highly-complex skills, perhaps - seems to fall into two distinct phases. The first, "skill-getting" phase can be a hard, uphill slog, especially by oneself. Classrooms and teachers can make the journey easier. Teach-yourself packages, though not bad in themselves, can replace the instruction side of the classroom experience, but not the vital support networks that keep the learner learning - hence the poor prognosis for self-instruction at this phase.

One passes a threshold to the second, "skill-using" phase when one finds oneself able to take part in real-life interactions and understand real texts, especially in listening mode. Then self-instruction becomes a positive advantage: fully-autonomous work on real texts and interactions enables one to achieve a richness of personalized and enjoyable input and practice that the classroom cannot provide. And though work on language form is necessary to consolidate autonomous work, self-instruction is probably just as effective as classwork here.

Thus the two-way link between proficiency and learning-means is the key to the self-instruction experience. Classwork followed by self-instruction appears to bring the highest ultimate proficiency; but one's existing proficiency level determines and restricts the learning-means that one can use at any time.

"Success", by contrast, is more a personal rather than an objectively-grounded sensation. It is aided by motivation, and seems to be reached when one feels one has "cracked the code" of the language.

Language experience can be defined in terms of language count, of whether or not one has tried an "exotic" language, and/or of the highest command one has reached in any language. Experienced learners have more awareness of the difference between the various language skills (especially listening, speaking and writing); and worry about them less, even if they are at the pre-threshold stage of a learning project, when listening

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and speaking are difficult - probably because they know the future gain that lies beyond the present pain.

Which language one learns has relatively little effect on final outcomes, especially in the productive skills of listening and speaking. This seems to be because the more "difficult" or "exotic" languages tend to be learnt by more experienced, better-motivated and better-disciplined learners, which enables them to reach similar levels as those learning "easy" languages - even if it may take them longer. Also, learners are not equally able to use transfer strategies or to come to terms with a language's intrinsic difficulties.

Obviously, the longer the stay in the target country, the better one's command of the target language.

Learning style determines whether one is better able to use experiential (speaking plus feedback) or studial means to tackle a language. Other skills, however, can compensate for a one-sided learning means; in order of importance, these are:

- having a good bank of learning strategies
- using writing to tackle the nuts and bolts of grammar and vocabulary
- being able to cope with full-speed input (a post-threshold skill only)
- package-wiseness
- making the most of external motivators and affective factors
- intensive reading and listening skills
- aptitude and discipline
- combining different learning sources and means

Thus we come to the end of the fieldwork side of our mapping project. It only remains - in the following, final Chapter - for us to draw the map itself and to describe its uses.

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CHAPTER 6

CONCLUSION

# 6.1 Preamble

The central aim of this project, as outlined in Chapter 1, was to map out the self-instruction experience. This has been done - in as much detail, anyway, as the tools I chose to take allowed. Thus the Checklist (Chapter 3) gave an overview of published self-instruction materials; the Learner Diary (Chapter 4) gave a longitudinal view of one self-instruction process; and the Language Experience Survey (Chapter 5) gave a wide-ranging set of reports on the experiences of 70 learners learning 124 languages. What emerges from the whole is a picture of a rich, complex variety of teaching and learning means, both coursebook-led and autonomous.

It is the purpose of this concluding chapter to put this map to use. I first look at the project's learning-theory implications (6.2) and its package-design implications (6.3). I then summarise advice for the self-instructed learner (6.4) and the language centre (6.5), and finally note a few pointers for future research (6.6).

# 6.2 Language-Learning Implications

## 6.2.1 Introduction: instruction and self-instruction

The main aim of this project was to give a deeper overall insight into the self-instruction process. Many findings, however, also have relevance to second language acquisition research as a whole. For one thing, many of the areas investigated (e.g. learner strategies) parallel areas under investigation in classroom SLA research. More importantly, however, the present studies did not restrict themselves to self-instruction, because self-instructed learners do not restrict themselves to self-instruction; and the model is based on the totality of their experiences.

What the project has done, in fact, is to explore the relationship between self-instruction and classwork within the overall language-learning project. And if one finding is to be isolated from the three studies, it is that effective learning depends on an interaction between the two means. Thus this section explores pedagogical and theoretical implications of the studies both in terms of self-instruction and in terms of language learning as a whole.

## 6.2.2 The learning process

### 6.2.2.a Teach-yourself and autonomy revisited

This thesis began by presenting a methodological folk belief - "teach-yourself bad, autonomy good" - and asking whether it had any basis in fact (Section 1.1). The answer, it seems, is yes. There do seem to be two distinct self-instruction routes, which might as well call "teach-yourself" and "(full) autonomy". If we gloss "teach-yourself" as package-led self-instruction, the outlook is poor. And if we gloss "full autonomy" as self-instruction using authentic texts and real interactions and reference tools (e.g. dictionaries and grammar-books), the outlook is better. But like many folk beliefs, the statement combines an accurate observation of surface effects with an over-simplistic

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attribution of causes. The difference, it seems, is not so much *what* is used (i.e. the surface features of the two methods) as *when* (i.e. their relationship with the learner's developing proficiency) and *where* (i.e. their position vis-à-vis classwork).

The problem with teach-yourself, it appears, is not the instructional features of the packages: those investigated seem no better and no worse than a set of classroom courses for a similar range of languages. It lies in the fact that packages tend to be used in the first phase of a postulated two-phase model of learning, when the social features of self-instruction put the learning process under the greatest strain.

This first, largely "skill-getting" phase involves building up one's underlying knowledge of the lexicogrammar, together with performance fluency to use this knowledge (cf. Meara, 1993); it ends when one has reached a level at which one can cope with real texts and interactions. Without the intrinsic interest and motivation of real texts and interactions, the task of getting up to this level (ability to handle most of the grammar, plus about 2000 word-families: Hirsh & Nation, 1992) is a hard one. In self-instruction mode, it demands good self-discipline and time-management skills, and high overall motivation/ need; plus, to a less crucial extent, ingenuity in getting speaking practice and feedback (5.5.1.b). And this is where classes and teachers have the advantage - by forcing an external discipline and routine on the learner, by giving intrinsic motivation, and by supplying speaking practice and feedback. The key issue, therefore, is the social context of Phase 1 learning, not the instructional features of teach-yourself packages. A reliance on fully-autonomous materials at low proficiency levels, in fact, would rob learning of even the structuring provided by the course package, which is a lot better than none at all: hence the domination of Phase 1 self-instruction by the course package.

Autonomous work, as the literature claims (2.2.3), does improve proficiency by giving a wider and more range of real-text input and real-interaction practice than could be supplied by classwork alone. Moreover, this input and practice is intrinsically motivating and geared to the learner's own interests and needs. Its learning and motivation advantages only come to the fore, however, once learners have reached a "functional-competence threshold" - i.e. when they can cope with real texts and interactions. Moreover, to keep performance improving, they still need to back up

immersion in real-texts and interactions with work on language as form (though it seems to make little difference whether the latter is teacher-led or solo).

Most importantly, however, the benefits of autonomy do not occur in isolation: it is the combination of classwork and autonomy, not autonomy alone, which is effective. The "ideal" learner path - i.e. the one that leads to the highest proficiency and sense of success - appears, in fact, to be a classwork-based Phase 1, followed by a largely or wholly autonomous Phase 2.

My findings, of course, are based on requests for data on full, rather than teacher-led, autonomy. But this is a very fuzzy dividing-line. I cannot be absolutely certain that some activities described by some respondents were not teacher-suggested; and even if I could be, the dividing line between parallel classwork + full autonomy on the one hand, and teacher-led autonomy on the other, may not be a particularly useful one in terms of learning implications. In other words, the findings regarding the interplay of self-instruction and class work probably apply to "autonomy" in general, whether full or teacher-led. Hence they give a more achievement-based confirmation of the intuitive support for (teacher-led) autonomy amongst teachers and learners found in several studies (Literature Review 2.2). But they also qualify the findings of these studies: most seem to have been done under optimum conditions for a shift towards learner autonomy, i.e. with classwork groups at or after intermediate proficiency.

### 6.2.2.b Thresholds

From a more general learning-theory viewpoint, the language-learning model proposed here - a largely skill-getting Phase 1, followed by a largely skill-using Phase 2, with a relatively sharp threshold in between - has few echoes in recent research, apart from its identification in terms of reading skills by some authors (e.g. Hirsh & Nation, 1992: Literature Review 2.3.5). It does, however, echo the "threshold level" proposed as the key defining-line in efforts towards the setting of a European standard for syllabus design during the 1970s (Van Ek, 1973).

We are probably talking, in fact, of a bundle of thresholds, each of which may be crossed at a different time in a different language. When learning their second Romance

or Germanic language, for example, most learners will cross the reading threshold well before the listening threshold, especially in languages (such as French or Danish) where the orthography preserves "family features" obscured by major sound-changes in the spoken form. The ability to guess word derivations will probably come later in a "bastardised" language such as English (cf. Meara, 1993) than one which, like Hungarian, has striven to keep its lexicon free from foreign taint (in fact, the dominance of English as the paradigmatic target language in SLA research may well be a major reason why threshold effects have not been more widely identified). And so on.

I would contend, however, that there is a strong argument for extending threshold effects to other areas of language than reading. The Language Experience Survey revealed that the key difference between high and low proficiency learners is the way in which they tackle and perceive the classic "four skills" - especially the three (listening, speaking and writing) *not* yet assigned thresholds in the literature. As for this radical change in strategic behaviour being a relatively sharp threshold rather a gradual evolution, I have little direct evidence beyond my own learner-diary perceptions. But a sharp threshold has already been reported in reading, and I know of no evidence or intuitive arguments why this should not be the case with other "skills", such as listening.

There may be thresholds not only in performance skills, but also in control of linguistic sub-systems. As noted in the Learner Diary Study (4.2.2), the intermediate-proficiency band where the transition to Phase 2 learning seems to take place is also when the (self)-instructed learner tends to "have covered" the whole of a language's grammar, even if actual performance is very rough-and-ready. And if the reading threshold is seen as essentially a lexical one (Literature Review 2.3.5), why not also identify an underlying lexical threshold per se? This, in fact, is by no means a radical idea. The notion of a "core working vocabulary" has long been used in foreign-language learning (West. 1953); and Van Ek's "threshold level" of 1973 was essentially functional/ notional, i.e. primarily based on lexical patterns.

Systemic competence - or "lexicogrammatical access", to paraphrase Meara (1993: Literature Review 2.3.3.e) - is probably at the root of the threshold phenomenon, in fact. If so, each skill-specific threshold - listening, reading, speaking, writing - would have two components: minimum adequate knowledge of the lexicogrammatical forms

appropriate to the channel in question (i.e. spoken or written), and minimum adequate real-time processing ability (cf. Meara, 1993, who sees "lexical access" as the key to the four language skills). This latter component would explain, for example, why (authentic) listening is usually the last threshold to be crossed, for listening appears to be the only real-life skill where communication strategies do not gain the learner more processing time (Learner Diary 4.2.8).

### 6.2.2.c Phases

But language is more than producing and understanding linguistic forms. It is also communication: with individual people, and with a culture (books, films...) that reaches beyond the individual. So what of skills such as discourse-handling, cultural fluency, interpersonal sensitivity, and so on? These, I speculate, may not be so much taught as acquired, by a combination of practical experience and self-aware reflection upon that experience. In other words, if the acquisition of a core working lexico-grammar is the key task of Phase 1 learning, the acquisition of a fully-fledged system of interpersonal and inter-cultural communication would seem to be the key task of Phase 2 learning.

I see the differences between the two phases, however, as differences of emphasis, not as absolute ones. I do not claim that real-text input and real-life practice have no role at earlier proficiency levels - rather, Phase 1 learners appear to need structured and explicit instruction in language form, genuinely comprehensible input, and unthreatening, structured practice as the *core* of their learning method. But alongside the primary task of using a teacher or a teach-yourself package to build up a working lexicogrammar, Phase 1 learners may also converse with native speakers and tackle authentic texts - indeed, when they find themselves in the target country, they have little choice. And - an important point, this - if effective autonomous work is to switch in as soon as the learner is able to profit from it, the strategies needed to use real text/interaction and to consolidate it with work on form must already be in place. In other words, they need to be trained - whether by the teacher or the teach-yourself package - before the threshold, not after it (Fernández-Toro & Jones, 1996).

Conversely, it appears that the *core* of Phase 2 learning should be active immersion in real language. But if the learner wants to do more than just "get by fluently", i.e. to expand his or her lexicogrammar beyond a minimum adequate level, immersion appears to work best if backed up with continued studial work.

## 6.2.2.d Instruction and acquisition

Second-language acquisition theory has been dominated for the last two decades by a debate about the various roles of formally-instructed and real-text input, of controlled and maximally realistic output (Literature Review 2.3.3). The present study falls roughly in line with recent classroom instruction research by claiming that the most effective language learning involves a combination of all four.

It does not, however, support the view (championed by e.g. Ellis R., 1988) that controlled practice is of little use in acquisition (unless, of course, the learners interviewed are as deluded as virtually all mainstream materials-writers): in fact, it strengthens the suspicion that such a view, based largely on the acquisition of complex grammar, does not apply to other language areas. A better model here, it would appear, is the cognitive "practice makes perfect" one (Literature Review 2.3.2.d). This holds that automatization and proceduralisation of new items is best achieved by repeated practice under gradually more stringent conditions; viewed in such a light, controlled manipulation exercises would provide the easiest conditions, and full-speed message-based communication the most stringent.

The present study also adds that the importance of each input and output technique depends on the learner's proficiency. Thus instructed input and structured progressions from controlled to communicative practice will tend to predominate at Phase 1. In Phase 2, however, real-text input and communicative output will tend to predominate, with (self)-instructed input being demoted to a consolidating role, and controlled practice perhaps disappearing entirely.

## 6.2.3 Learning in the target country

The finding that length of stay in the L2 country is linked to proficiency is hardly a surprising one. The interaction with the two self-instruction paradigms (teach-yourself and full autonomy) is worth highlighting, however.

The problem with Phase 1 self-instruction was identified as a social one: the loneliness of the long-distance learner. In the foreign-language environment, however, these disadvantages are largely nullified. Need, a key motivation-booster, is high; conversation partners are many, and feedback is immediate; input is so all-pervasive that at least some of it is comprehensible; and with all these other advantages, a little discipline goes a long way in providing a quick and visible sense of progress. Thus, as many learners remarked, package-led self-instruction does seem to work well in a target-language setting.

The target-language environment has various benefits for Phase 2 learning. It is obviously the ideal arena for real-text/interaction work. Experience of the target culture makes authentic materials, even when used in the learner's mother country, more relevant and interesting. Indeed, some learners who have lived in the target country end up "retiring" from learning once a high command has been reached - a rare equation of dropout with success (though disappearing need on return to Britain could also be a factor).

## 6.2.4 Learners as individuals

As learner-individual characteristics are seen in mainstream SLA thought as having a crucial effect on the learning process (Skehan, 1989, etc.: see Literature Review 2.4.2.a), they deserve a detailed discussion.

## 6.2.4.a Physical and background factors

### 6.2.4.a.i Gender

Gender has few meaningful links with the self-instruction variables examined. This implies that the common view that "women are better at languages", backed up by research showing a preference for foreign languages by teenage girls and a rejection by teenage boys (e.g. Powell, 1986), is largely a socially-conditioned stereotype.

### 6.2.4.a.ii Language-learning experience

Class-only experience has remarkably little effect on Solo/Mixed learning projects: experience of self-instruction *per se* seems to be what counts. In other words, self-instruction, whether in combination with classwork or not, involves a particular set of skills which classwork alone does not normally provide. If autonomous strategies should already be in place before the transition to Phase 2 learning, however, classwork needs to provide them; and the fact that it does not do so already implies that special awareness-raising and training activities need to be devised (cf. Oxford, 1990; Broady & Kenning, 1996; etc.).

Otherwise, as has already been noted (Discussion 5.5.1.f), wider experience gives more awareness of the "four skills" as distinct entities requiring distinct approaches (especially writing), and leads learners to be less fazed by initial problems in listening and speaking.

This study also identifies a sub-species of learner: the "language magpie", who uses every available means - but especially self-instruction - to widen her range of languages. Each attempt may not necessarily lead to high command, or even "success"; but these learners find learning a new language an enjoyable and worthwhile means of coping with a short term need, or even a whim. Indeed, the fact that a fifth of learners chose to describe language learning as a pleasure in itself (*LearningPleasure* Keyword: Table 5.4.4/xix) is a vital antidote to the "pain now, gain later" image of language learning that this study might otherwise be in danger of promoting!

## 6.2.4.b Affective factors

### 6.2.4.b.i Motivation

Strength of motivation has been identified by many studies as a key factor in language learning (Literature Review 2.4.2.b.i). The present findings are no exception. Here, motivation is linked especially to a sense of success, and it becomes more crucial when the going gets harder - i.e. when learning "exotic" languages, or in self-instruction-only mode (Cross-Links 5.4.5.c.ii, 5.4.5.d.i). Intrinsic motivation is supplied by classwork, as well as by reading and positive transfer/learnability perceptions. The present studies did not distinguish between motivation and attitude.

### 6.2.4.b.ii Sense of success

Interestingly, this turns out to be as much a feature of the learner's affective persona as of concrete achievement in a particular language. The same is true for motivation and L2 learnability, to which "success" is closely linked (cf. discussion in 5.5.1.c).

## 6.2.4.c Personality factors

The only item isolated here was lack of inhibition - the *Confidence* Keyword. It appears aided by increasing self-instructed experience (Cross-Links 5.4.5.c.i), implying that it is not an immutable characteristic.

## 6.2.4.d Cognitive factors

### 6.2.4.d.i Aptitude

Aptitude is perceived by learners as closely related to the metacognitive *EFFORT/PLANNING* skills and ability to handle a package's input gradient. This "self-instruction-wiseness" mirrors the "classroom-wiseness" proposed by Skehan as one of the two sub-components of classroom language-learning aptitude (1986; cf. Literature Review 2.4.2.d). It also confirms, at least in part, O'Malley & Chamot's speculation that aptitude may also involve (learned) strategic skills (1990: q.v.): metacognitive

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strategies are linked both to higher Solo/Mixed proficiency and to greater experience with self-instruction proper, which implies that they may well be learned by experience (though as ever, there may also be a reverse relationship: that an innate effort/planning ability drives learners to achieve higher proficiency and to prefer self-instruction). On the other hand, perceptions of aptitude per se have virtually no links to achievement and experience markers.

### 6.2.4.d.ii Learning style

Learning style, by contrast, appears to be an important factor in learning (see discussion in 5.5.3.b.i). The present studies, however, support existing models of learning style as a personal orientation towards learning along a experiential↔studial cline, with no single style having any particular learning advantage (cf. also Literature Review 2.4.2.d).

### 6.2.4.d.iii Language transfer and cognacy

Effects here are not clear-cut, mainly because of interaction with other factors. Firstly, transfer strategies appear to be cognitively-mediated, as Kellerman (1985: Literature Review 2.3.4) claims: learners with a studial learning style are better than those with an experiential style at using cognacy links and making sense of potentially difficult target-language structures. In addition, less L1-cognate languages tend to be attempted by more experienced and more motivated learners, thus giving similar average command levels per language. Though it may well take learners longer to get there with less L1-cognate languages, this cannot be seen from the present studies.

Transfer/ease factors, however, do seem to affect "controlled-input" skills, such as reading and lab-work, more than full-speed listening and speaking. This implies that they are used during controlled rather than automatic processing - whereas global proficiency judgements are probably based more on the latter. In addition, *perceptions* of intrinsic ease are important in engendering a sense of success in the language-learning project (cf. Kellerman). Finally, there is strong support for the view that the target language can be modelled as readily, or more readily, on an L3 as on the mother tongue.

Thus, in the debate between the proponents and opponents of transfer as a key factor in second-language acquisition (summarised in Ellis R., 1994; cf. Odlin, 1989), the present studies do not wholly support either side. Instead, they suggest a few reasons why neither has gained conclusive victory.

## 6.2.5 Learning strategies

Learning strategies, as "potentially conscious, intentional acts aimed at making learning more effective" (Literature Review 2.4.3.a) obviously have a central role to play in self-instruction: in classwork one can imagine a learner being a passive recipient of knowledge, but in self-instruction every single learning act is intentional on the part of the learner. Once again, the present findings confirm existing studies in outline whilst adding to them at a detailed level (for full discussion, see 5.5.3.c).

Thus the Language Experience Survey confirms the two-way split identified in early learner strategies studies (Literature Review 2.4.3.c.i) between "strategies that manage learning" (metacognitive strategies, e.g. effort/planning), and "strategies that tackle specific tasks" (e.g. study buddy or dictionary use). The latter group, however, absorbs an even more specialised set of materials-handling and -evaluation techniques; and the Survey finds no evidence for the "affective strategies" (self-encouragement, etc.) cited by Oxford (1989) and O'Malley & Chamot (1990).

The findings also deviate from accepted wisdom in that they do not see all strategy-use as an absolute good. Whereas the learning-management (metacognitive) skills are related to high command, the "task-specific" strategies seem only to enable the learner to cope with the exigencies of self-instruction, and have no direct link to achievement.

## 6.2.6 Shortening the odds

The problem with *ab initio* self-instruction, it seems, is not so much the package as the means itself; thus improving package design would only slightly improve the learner's prospects of achieving high command outside the target country. But not every learner

needs, wants or is able to embark on the long, classroom-supported quest for the grail of advanced proficiency. If the learner needs a short-term smattering of Chinese, say, for a one-off holiday, or there are no classes available, then she needs a well-designed self-instruction course in Chinese - for if the odds are stacked against her, it is vital that they at least be *shortened as much as possible. Thus the following section presents a set* of guidelines for improved package design.

# 6.3 Guidelines for Teach-Yourself Package Design

## 0 General

This section adapts the descriptive Package Checklist of Chapter 3 in the light of recommendations from the three studies (and, to a lesser extent, from the design literature: Literature Review 2.5), in order to give a prescriptive set of guidelines for package design. Thus its structure parallels that of the original Checklist.

The Guidelines are meant to apply to all proficiency levels (not only *ab initio*). They assume an all-round rather than a skill-specific package (for the latter, not all the recommendations will need to be heeded). The Checklist boxes are replaced by do's and don'ts (☺ and ☹ respectively, with ☺ denoting a value-neutral or optional feature). The fact that there are more do's than don'ts underlines the key, over-arching recommendation:

☺ The more features, the better. Thus the package can cover more aspects of the learning experience, cater for different learning styles, and aid enjoyability by giving more variety.

Other general recommendations are:

☺ For re-issues of old courses, genuine full-scale revisions are needed about every 10 years: modernity of syllabus content is very important to the learner.

☺ But raid both modern and traditional courses for new activity ideas.

☺ Use humour (in moderation).

☺ Thorough piloting with learners is a vital part of the design process.

## 1 Language-contrastive factors

For package-design purposes, English will have to be taken as the reference language, as L3 knowledge varies from learner to learner.

**Item 1a. Phonology**

☺ Intrinsically difficult or alien features will need focused production and comprehension activities throughout the course....

☹ ...not just in a one-off introduction!

**Item lb. Script**

(ditto)

**Item 1c. Lexis**

☺ High cognate-count can allow a higher new-vocabulary input gradient.

☺ With Romance/Germanic languages, cognacy links can be pointed out, especially generative ones (e.g. Spanish -ción = English -tion), and cognate-seeking strategies encouraged.

☺ Reading activities probably give the best context for such strategies.

☹ But don't assume all learners are good at using them.

**Item 1d. Grammar**

☺ For the "difficult bits", present memorisation strategies for studial learners and "don't-worry" strategies for experiential learners.

# 2 Learning objectives

**Item 2a. Learner target group**

<u>.1 LSP</u>

☺ Specify target purpose (general, holidays, etc.) on package cover.

<u>.2 Group setting</u>

☺ Don't assume a class course can double as a teach-yourself package: they need separate design approaches.

## *Item 2b. Actual objectives*

### .1 Language elements

(Include:)

☺ *Lexis (crucial!)*

☺ Grammar

☺ Phonology

☺ Script

☺ Pragmatic function

☺ Discourse structure

☺ Culture

### .2 Varieties

☺ Different dialects/regional varieties

☺ Different styles

☺ Different registers

### .3 Skills

☺ Reading

☺ Writing

☺ Listening

☺ Speaking

☺ Paralinguistics

☹ Translation (minor prominence, except for specialist learner-groups)

### .4 Process aims

☺ Study-skill training: vital, throughout the course!

☺ Acculturation

☺ General cognitive/affective development: the intrinsic interest/pleasure of language learning is perhaps worth stressing.

<u>.5 Performance</u>

☺ Be aware of the fluency⇔accuracy focus of each learner activity, and strive for a
   balance between the two at unit level.

<u>.6 Entry and exit proficiency</u>

☺ Use clear specifications of entry and exit proficiency level in performance terms (as
   in the 9-point IELTS scale below) as a baseline for defining course content and
   procedures:

| | |
|---|---|
| (Virtually) no knowledge of the target language | 1 |
| Command of basic words and phrases | 2 |
| Conveys/understands general meaning in a few restricted situations | 3 |
| Can handle basic situations, though with problems | 4 |
| Rough-and-ready command of good range of situations, many mistakes | 5 |
| Effective general command, some complex language, some mistakes | 6 |
| Good general command, complex language, occasional mistakes | 7 |
| Very good command, few mistakes/misunderstandings | 8 |
| Equivalent to educated native speaker in all but accent | 9 |

**Item 2c. Stated aims**

☺ Be honest!

# 3 Syllabus

**Item 3a. Organising criteria**

<u>.1 Main syllabus-type</u>

☺ For a general course, whether the main organiser is structural, situational, notional/
   functional or multi-stranded is probably not so important...

### .2 Syllabus strands

...as long as all content areas adopted are organised into coherent syllabuses:

☺ Phonology

☺ Script

☺ Grammatical structure

☺ Situations/settings

☺ Notions/lexical fields - but add etymological word-building topics and keyword-imagery ideas around key items.

☺ Language functions/style

☺ Skills/tasks

☺ Culture

**Item 3b Sequencing**

### .1 Sequencing criteria

☺ Difficulty/complexity

☺ Utility/frequency

☹ Storyline (perhaps)

### .2 Recycling of syllabus content

☺ In special revision units

☺ In later units

# 4 Role of materials

**Item 4a Make-up of the course**

### .1 Proficiency levels

☹ Several discrete level packages will reduce weight and increase sense of progress, but a single package will feel less bitty, and make a better reference handbook (cf. Note 4b.2 below).

## .2 Component types

☺ Coursebook, reference book, workbook: combine into one volume.

☺ Audio recordings: crucial; add transcripts.

☺ Video recordings: add transcripts.

☺ CALL software.

☺ On-line CALL: Internet pages are a design option worth exploring.

☹ Live broadcasts - nowadays, largely superseded by audio-cassettes and videos.

## Item 4b Typical Unit size and gradient

☺ Keep units fairly short, in order to give a sense of progress.

## .1 Page ratios

☺ L2 dialogue or prose: several short texts rather than one long one.

☺ Illustrations: use to aid general visual design and accessibility.

☺ Vocabulary lists: size will depend on new-input gradient (see 4b.2 below); list "learn" and "don't learn" items separately.

☺ Language explanation: important. Separate sections are more accessible for reference; boxes alongside L2 texts can supply brief tips and reminders.

☺ Learner activities: have enough activities to ensure that target content is thoroughly practised; aim for a rough balance between medium and message focus.

## .2 Target lexicon

☺ Per unit: use piloting studies to find the optimum new-input gradient for the language in question.

☹ Per package: target lexicon will depend on new-input gradient. Assuming that a course as a whole aims to take the learner over the 2000 word-family "threshold level", a low gradient (i.e. relatively few new items per number of pages) will mean splitting the overall course into several level packages (cf. Note 4a.1 above).

## Item 4c Text features:

## .1 Authenticity of dialogue or prose text

☺ Scripted but natural text should form the bulk of input at lower levels.

☺ Fully-authentic text (including listening) is useful for skill training. But keep texts very short, especially at beginner level. Choose texts which native speakers would regard as "easy" or even "trashy" - e.g. in reading: attractive and clear visual design and typography, short sentences, accessible and intrinsically interesting content (comics, popular magazine features, etc.). Make sure all language items needed to get the general meaning of the text and to do the task are known to the learner: add a pre-teaching activity if necessary. Train learners in coping strategies, e.g. skimming, scanning, contextual guessing, and not lingering on unknown items.

☹ Avoid old-fashioned or highly unnatural text unless there is a positive reason (exploring different language varieties and genres).

## .2 Illustrations and graphic design

☺ Illustrations should contextualize/explain where possible...

☺ ...though "merely decorative" illustrations are better than none.

☺ The writer should work closely with the graphic designer to make sure graphic design helps readability, structuring of learning, etc. Get feedback on this from piloting studies.

☺ Legibility/word-recognisability: target-language font-size needs to be significantly bigger than for native speakers, especially with a non-Latin script.

## Item 4d Language explanation

## .1 Code, .2 Accessibility

☺ Use mother tongue for linguistic explanations. Explanations should be explicit, but in simple, non-specialist language. Define enabling vocabulary in boxes beside the text, e.g.:

> The *imperative* is the form of the
> verb which gives orders or
> instructions. For example: **Stop!**
> **Don't wait!**

☺ Use the L2 for activity instructions - for beginners, perhaps once activity formats are familiar (i.e. using the mother tongue for the first few units).

☹ Avoid iconic symbols unless their meanings are clear without a key.

### .3 Means

☺ Alternate inductive and deductive input, but always give an explicit summary of the target linguistic content sooner or later.

**Item 4e Task features**

### (.1.) .2 Medium focus

☺ There should be tasks which isolate and manipulate complex forms, and give feedback...

☹ ...but too many formal-manipulation exercises can be boring!

☺ Repetition, memorisation: advise and train strategies.

☺ Translation: of short, realistic texts.

### .3 Message focus

☺ Learner personalization: wherever possible.

☺ Language use paralleling real-life language use: wherever possible.

☺ Reading/listening practice.

☺ Elicited speech or writing.

☺ Problem-solving.

☺ Game structure; can also add fun element to medium-focus activity.

☺ Integrated-skill activity.

☺ Role-play/simulation, interpersonal communication: advise learners on how to find conversational partners (study buddies, more advanced informants, learning exchanges with native speakers).

☺ Work outside course framework: stimulate this (preparation for autonomy).

### .4 Learning to learn

☺ Have an explicit study/strategy-training strand: briefly state the purpose of each activity, and the strategies it needs (though avoid information overload!).

☺ Alternatively, have a fixed "learning to learn" section in each unit.

# 5 Relationship with the learner

### Item 5a Learner autonomy

☺ A prescribed page-by-page route is probably best: it gives the learner clear guidance and structure, and progress can be measured in page-counts.

☺ Different learning styles, etc. can be catered for by offering a variety of activities...

☺ ...A "skip this activity if you like" heading could give optional routes within a page-by-page framework, but might be dangerous: it will need piloting.

### Item 5b Learner support

#### .1 Intrinsic support features

☺ Contents pages listing language points covered.

☺ Alphabetical page-index of language points/vocabulary: perhaps merged with...

☺ ...L2⇨English dictionary.

☺ ...English⇨L2 dictionary.

☺ Separate grammar reference section.

☺ Separate phonology reference section.

☺ L1 translations of presentation texts: in parallel column to L2 text (can act as memorisation prompt)...

☹ ...but don't give L1 translations of reading-practice or consolidation texts.

☺ Exercise keys.

☺ Tests: with scores linked to feedback in terms of revision advice, praise, etc.

☺ Notionally-grouped glossary of words and phrases: piloting studies would tell whether this is worth the extra bulk.

#### .2 Strategy-development features

☺ Needs analysis: perhaps a brief "Is this package right for you?" Introductory Section.

☺ Encouragement/feedback on progress: important. The more concrete the better; linked to tests/revision units.

☺ Learner contract: usefulness not known.

### .3 Advice and backup

☺ It is vital for the package to point to outside sources of support, e.g.:

☺ ...teacher/class

☺ ...native-speaker informants and talking partners: these can be found in Britain via universities, language schools, restaurants, expatriate clubs, churches, etc. Advertise conversation exchanges on university/language-school notice-boards. Non-native speakers - e.g. friends and family - are just as good, especially for lower levels.

☺ ...language-learning advisors: more difficult to find, unless the learner knows a language teacher, or the publisher can supply a help-line service.

☺ ...study buddy/learner group; also French/Welsh/etc. learner clubs.

☺ Link some learner tasks to real interlocutors/advisers (e.g. "Find a native speaker or a fellow learner and ask him or her...").

# 6.4 Guidelines for Self-Instructed Learners

## 6.4.1 Introduction: learner advice and training

There is more to learning than the teach-yourself package, however - even at lower proficiency levels. As the present studies have shown, learners come to the self-instruction experience with their own characteristics, orientations and opinions. They learn different languages, from different starting proficiencies; they learn for various reasons and with differing motivation levels. But most of all, they use a wide and varied range of techniques, whether self-engendered or born of advice from teachers and fellow learners.

Not all learners have access to all the ways of reaping the best advantage from their own learning persona and from what language they are learning, where and why. The guidelines here, which are mainly taken from the interview protocols (Sub-Sections 5.4.4.c-m) are intended to form a resource bank for programmes to help learners improve their self-instruction techniques. As the guidelines are based on the experiences of learners, it is hoped that they have a good chance of being taken on board by learners; for this reason, recommendations in the methodological literature (see Literature Review 2.4.3 and 2.6 for overview) are not given unless mentioned by the Diary and Language Experience Survey learners.

It is, however, a resource inventory rather than a directly usable guide. Self-instruction training (cf. Literature Review 2.4.3.c.iv) can come in various shapes and widely-differing sizes: the published how-to-learn-languages handbook (cf. Doyle & Meara, 1991) or the briefer language-centre study guide, the classroom or language-lab worksheet, the class or teach-yourself coursebook syllabus strand, etc. (see 6.5.4). Advice will almost certainly need linking to practical activities on the part of the learner - which, for space reasons, I have not added to the inventory (cf. e.g. Oxford, 1990, or Ellis G. & Sinclair, 1989). It is hoped, however, that the advice given here can be translated into any of these forms.

Advice per se is given in bulleted (★ • ✧) paragraphs; introductory remarks, comments, etc. are either unbulleted or in [ ]. The order generally reflects that of the GROUP-Quality Factor Analysis, but with a few changes to make the structure clearer to the learner.

## 6.4.2 Learner, know thyself: self-analysis questionnaires

The first stage should almost certainly be that of the learner analysing herself and her learning task, in order to enable her to set herself realistic goals. This could be in the form of a questionnaire:

★ **Learning style**, asking questions such as:
   • Do you find grammar tables mind-boggling or a useful summary?
   • Do you like to "have a go" at talking with people in a foreign language, even if you're not sure of the words before you start?
   • [etc.]

★ **Language aptitude and experience**, asking about:
   • how many languages known, and to what level;
   • subjective experiences of school foreign-language learning and real-life use;
   • ability to "crack" unfamilar grammar- and sound-systems [cf. "classical" aptitude tests: Literature Review 2.4.2.d];
   • metacognitive skills:
      ✧ time-management
      ✧ self-discipline
      ✧ routine-setting
      ✧ stamina
      ✧ goal-setting.

★ **Motivators**, asking about:
   • need: career, exam, holidays, residence, study, family, romance...
   • contact with the L2 country/native speakers/other learners
   • liking for the L2 culture and language

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- liking for language-learning in general
- wish to catch up with the rest of the family
- self-confidence and expectations

★ **Existing proficiency**: self-assessment on a performance-based scale, e.g. IELTS (see Section 6.3: Item 2b.6).

★ **Learning opportunities**, asking about access to:
  - suitable and affordable classes
  - suitable and affordable self-instruction packages
  - L2 settings, native speakers, other learners
  - authentic listening and reading materials

Advice on goal-setting could then be based on the profiles generated by these questionnaires.

## 6.4.3 Selecting a learning means

★ Below a proficiency level of 4/5 (IELTS: Section 6.3: Item 2b.6):
  - classwork, if available, is the best learning means, with self-instruction as back-up - e.g. to fill in gaps or to give more learning time.
  - if no classes are available:
    - ✧ Firstly, buy a package (if you can afford it, buy two!). But choose carefully: visit several bookshops to survey what packages are available. Cassettes are a must. Read the introduction and look carefully at a sample unit of each package to find whether it suits your needs and learning style. [A 1-page "points to look out for" checklist could be derived from the Package Guidelines in Section 6.3.]
    - ✧ Then, ring local high-education institutions to find out if they have a Language Centre; if so, join it as a member of the public. Visit it regularly, trying out various learning packages and authentic materials which complement your own learning package.

★ Buy a decent (at least 70,000 words each way, modern) bilingual dictionary.

★ Above a proficiency level of 4/5:

- If possible, join your local Language Centre (see above).

- Get a textbook or join a class suitable for your proficiency level.

- Buy a good bilingual dictionary (as big as you can afford), and get hold of a grammar reference book (as part of a coursebook, or stand-alone).

Other autonomous learning techniques and tools are described later.

## 6.4.4 Learning as an individual

This section focuses on how, once awareness has been raised, learners can capitalise on and compensate for personal learning style and aptitude.

### 6.4.4.a Learning style

★ One factor (among several) that governs language learning is your personal "learning style": whether you are largely *experiential* (i.e. prefer to learn by "having a go") or largely *studial* (i.e. prefer to learn by first finding out how it works), though many people are in between. The key fact is that neither style is "better" for language learning.

- If the learning style questionnaire showed you are strongly experiential, you will probably feel more drawn to the advice in the Experiential section below. Try out the advice in the Studial section as well, as many tips will be useful: but don't worry if some activities seem to go against the grain.

- If the learning style questionnaire showed you are strongly studial, you will probably feel more drawn to the advice in the Studial section below. Try out the advice in the Experiential section as well, as many tips will be useful: but don't worry if some activities seem to go against the grain.

- If you are somewhere in between, you will probably feel comfortable with a mixture of techniques from both sections.

<u>6.4.4.a.i Experiential strengths: speaking, pronunciation and feedback</u>

★ You are probably quite good at learning by "**having a go**", even if you make mistakes: see this as a strength, not a weakness.

★ You probably like learning by interacting with **other people**. See 6.4.5.a below for details.

★ You probably enjoy **speaking** activities. Besides speaking with people, try:
   • to find a course package with speaking exercises.
   • listening to cassettes and repeating.
   • using gapped cassette dialogues, or making your own: play the dialogue, pausing the cassette after each speaker and saying what you think might come next.
   • having conversations with yourself, or your dog/cat/budgie (though you need to speak out loud to get most benefit).

★ **Pronunciation** activities:
   • repeating cassette dialogues.
   • speak to yourself - e.g. snatches of dialogues, lists of numbers, months, etc.
   • conversations with native (and good non-native) speakers.
   • get a native speaker (or good non-native) friend to make you a pronunciation cassette.
   • some people find pronunciation guides in coursebooks useful for consolidating what they have learnt (but not everyone, so don't worry if you find them baffling).

★ Getting **feedback on learning** is important in helping you improve, and giving you a sense of progress. Get feedback and a sense of progress by:
   • asking other people (see 6.4.5.a below) to give you feedback on speaking.
   • asking other people to correct your writing.
   • doing coursebook tests.
   • joining a class.
   • registering for an exam.
   • counting how many coursebook pages you get through in a week.

- setting yourself a target (e.g. learn 5 verbs, or read 2 stories) and a time to reach it in (e.g. by the end of the week) - can you beat your target time?
- after an encounter, asking yourself how well you performed.
- simply using the language in the foreign country.
- pronunciation:
  - ✧ repeat after a cassette in the language lab (or read a coursebook dialogue into a cassette), then check yourself against the original.
- writing, vocabulary, grammar:
  - ✧ write/translate a short text without a dictionary, then check it with a dictionary;
  - ✧ do the same, but testing your grammar (check with a coursebook).

★ Don't worry if you can't cope with formal **language explanations**: learning by doing is just as effective in the long run.

★ Don't worry if **similar words from other languages** sometimes seem to interfere: there are actually more true friends than false friends across languages!

6.4.4.a.ii Studial strengths: language explanations and language similarities

★ You are probably quite good at coping with "traditional" **language explanations**, and like to understand how a piece of language works before trying it out: see this as a strength, not a weakness.
  - When choosing a grammar-book or a coursebook, make sure it has thorough but clear and "user-friendly" explanations.
  - Re-read language explanations at a later date - once you have experienced the forms in real texts, explanations often make better sense and lead to greater accuracy in use.

★ You are probably quite good at using **similarities between languages** to help you learn. Techniques:
  - When you meet a new word in a Romance or Germanic language, look for words which are vaguely similar in English (or any other languages you know in that family): they will probably be related. The link will help you remember words you meet, and guess unknown words.

✧ Look out especially for systematic sound-links (e.g. German *pf* = English *p*).

- Look for similarities between grammatical structures too, and sounds (the languages needn't be related).

★ **"Difficult"** or exotic languages can make interesting and enjoyable challenges!

★ Don't worry if you **forget** a lot of what you learn - everybody does. And if you feel you forget more as you get older, research shows that this is compensated for by having better learning strategies.

★ Don't worry if you find **native speakers** hard to understand, too daunting to speak to in their language, or if they don't seem to appreciate your efforts. As your overall command rises, communication will get easier, and people will be more appreciative of your efforts.

★ Don't worry if you lack **confidence in speaking**: it will come as your knowledge of the language increases.
- Try making up and running through a "mental script" (with all possible variations, looking up key words in a dictionary) before a real-life encounter.
- if you find it embarrassing speaking to a cassette while others are around, do cassette work in the car, or on a walkman while you're doing the housework or walking the dog.

★ Don't worry if your language's **pronunciation** seems difficult, whether because the sounds are plain difficult, because the sound and spelling don't correspond, or because you're a poor mimic:
- comprehensibility is more important than native-like pronunciation.
- it will improve with time and practice.
- good pronunciation doesn't necessarily mean good underlying knowledge: think of the areas of the language which you are good at!

### 6.4.4.b Aptitude and organisation

The aptitude/experience profile generated by the questionnaire (6.4.1) could be used as a baseline here.

★ Though it is true that some people are better at learning languages than others, this is only a relatively minor factor in language learning.

★ Good **discipline and organisation** strategies form a big part of "a gift for languages":

- Set yourself clear and realistic long-term goals (e.g. to be able to order meals, go shopping and book hotels and excursions in Spain by next summer).

- Set yourself short-term (e.g. weekly) goals: a number of pages to cover, or a number of words to learn.

- Find and set aside a regular time-slot for learning. Many learners use "dead time" not useful for anything else: in the bus or train to work, or listening to cassettes in the car, whilst doing housework or walking the dog.

- A little every day is much better than a lot once a week.

- Like learning any new skill, language learning can be hard work at first - you stand more chance of succeeding if you accept the fact and buckle down to it. But language learning also has its rewards:

  ✧ it can be fun in itself.

  ✧ no matter how low your knowledge, you can always get much more out of a visit to the country than a non-speaker.

  ✧ language learning is a good way of meeting people: other learners, and native speakers (they are often delighted to help someone learn their language, especially if it is one not so widely studied).

  ✧ the first stage is the hardest: once you get to a level where you can function in a rough-and-ready way in the language, using it becomes fun and learning it becomes easy.

- Self-discipline is vital! Don't give up on your goals, and try not to break your working routines.

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- Don't let temporary difficulties put you off learning. If a text is incomprehensible or an activity too difficult, drop it and do something else. The knowledge will come in time, by other means.

- Avoid lengthy gaps in learning, especially at low command levels - it can take a while to catch up again.

- Join a class, especially if you're a beginner or elementary learner (see 6.4.5 below).

- At higher proficiency levels, "authentic" reading, listening and speaking should take up a lot of your learning time. But if you want to keep making progress, don't forget to do language-study activities as well.

## 6.4.5 Combining learning means

★ A combination of self-instruction with classwork is better than either in isolation:

- At lower levels, classwork provides an excellent base for learning, mainly because it can give:

  ✧ motivation and discipline

  ✧ speaking practice

  ✧ understandable language explanations

  ✧ feedback

  ✧ inspiring teachers

  ✧ often, native-speaker teachers

- If you join a class, you're less likely to drop out of learning in the early stages.

- But at higher levels, self-instruction is more important:

  ✧ you need to do a lot of solo work on real language (listening, reading, speaking, writing), using texts and activities that interest you;

  ✧ you need to back this up with language-study activities; but whether these are solo or in class doesn't matter.

★ Using several self-instruction courses or sources is better than using just one:

- different materials tend to be good at different things: e.g. one might have more up-to-date vocabulary and speaking activities, whereas another covers grammar better;

- variety is the spice of learning!

★ When in the target country, don't abandon your study programme: a combination of language study and real-life immersion is the most powerful learning combination.

★ Multiple language learning:

- if learning a related language to one you already know (e.g. Spanish after French): the old language will interfere a bit, but help an enormous amount.

- learning two languages at once:

    ✧ the risk of interference is no higher than when learning one after the other...

    ✧ ...but it does involve double the work - can you afford the time?

## 6.4.6 Strategies for self-instruction

This section looks at self-instruction strategies and techniques which seem more-or-less equally accessible to all learners - except for full-speed listening, which depends to a great extent on underlying proficiency.

### 6.4.6.a People-based strategies

★ Other people are a key resource if you are teaching yourself a foreign language - not only for conversation practice, but also for advice and feedback. Get in touch with:

- **native speakers**: by visits abroad, by joining conversation classes, by advertising "conversation exchanges" on notice-boards in local higher-education institutions or language schools, by going to restaurants, by joining an expatriate church or social club.

✧    if you know people abroad, write to them in their language;

✧    ask them to send you reading and listening materials (magazines, songs, cassette letters, etc.), or write about their daily life.

•    **fellow-learners:** advertise in local libraries, language centres, etc. Get in touch with old class-mates (if appropriate). Many people make language-learning into a whole-family project!

✧    arrange to meet regularly, to discuss and correct each other's work, or just to chat in the foreign language.

✧    teaching someone else - e.g. another family member - the language you are learning is an excellent revision and practice method!

•    **non-native-speakers:** if you know people who have a good command of the foreign language, ask them for feedback and advice on your language problems, or just to chat in the foreign language.

### 6.4.6.b General self-instruction techniques

★    **Take a pocket-sized notebook** everywhere you go, especially if you are in the foreign country.

•    *write down any useful words or phrases (just the useful ones: not all!)* which *you come across in reading or listening,* or which you find in a dictionary when "preparing a script" for speaking (see Confidence in speaking: 6.4.4.a.ii above).

•    in the bus, train or on walks, memorise the items (tip: a clear plastic bag protects it from the rain!). See Memorising below.

★    **Most learners say that memorising words, phrases and grammar is crucial** if you want to keep up a steady sense of progress:

•    repeating out loud (even mumbling quietly) is better than just looking.

•    use translated lists or dialogues: cover the foreign-language item or sentence and try to say it (out loud) using the English as a prompt.

•    try making a personal loose-leaf dictionary (parallel English and foreign-language columns).

- writing jottings out again neatly in a personal; notebook or loose-leaf file - e.g. grammar tables, vocabulary in parallel foreign-language and English columns - is a memorisation technique in itself.

- phrases (especially from texts and dialogues which you have worked on) stick in the mind better than individual words in the long run - but make sure your phrase only has one new word or grammar item.

- if a word won't stick, try making a silly image which puns what the word sounds like in English with what it actually means: e.g. with German *Rathaus* (which means *town hall*), think of rats running out of Hamelin town hall. Then you'll never forget it!

- set yourself weekly memorisation targets.

- don't get obsessed by memorisation: a little often is best (20 minutes maximum per session). Once it gets boring, do something else. Make sure you vary your activities: reading, listening, repeating, memorising, speaking, writing...

★ **Repeating course dialogues out loud helps memorisation and speaking/ pronunciation.**

- if you find it embarrassing speaking to a cassette, see: Confidence in speaking (6.4.4.a.ii above).

★ **Don't do activities just once - do activities again the following day.**

- Listen to and repeat presentation cassette dialogues several times until phrases start sticking in your mind: it is a painless way of memorising new language.

★ **Regular revision is vital:**

- when you revise, you will find that you have "forgotten" a lot of what you have learnt. Don't worry - this is normal: you will find you will learn the items much more quickly the second time, and they will stay in memory much longer.

- revision needn't be a formal programme: try listening to cassettes and reading dialogues from earlier in the course. Or - even better - from a different course package (at a level just below your own present level).

★ **Dictionary use:**

- See 6.4.3 above for dictionary-buying tips.

- Use it to find out words for your own messages: writing letters, preparing for spoken encounters; afterwards, learn the most useful words.

- Use it when reading - but after 15 minutes, put the dictionary away and try to guess the meaning of words as you read.

- Use it to find out how to pronounce words (if that's not clear from the spelling): familiarise yourself with the phonetic system used by your dictionary.

- When you look up a foreign word, look at the words around it that seem to be related (e.g. German *Haus, Hausfrau, häuslich...*), and note down any that seem especially useful. Learn them as a family.

- Write a text without a dictionary, then check the words with a dictionary.

★ Some people find **tourist phrasebooks** useful as a back-up to a regular dictionary, but they're no good for learning a language by themselves (you need a decent coursebook as well).

★ In most languages, long, difficult words tend to be built up from short, easy ones - e.g. German *Fernsehen* (*television*) is made up of *fern* (*far*) and *sehen* (*seeing*). **Splitting up a word** like this can save you dictionary work when reading, and is a very useful reminder when trying to learn the word.
- Your dictionary can help with finding the basic building-blocks.
- Use your dictionary to find other "family members" - e.g. German *Fernglas* (*far-glass*) = *binoculars*. Learn them too, if they're useful.

### 6.4.6.c Getting the nuts and bolts right: grammar, vocabulary and writing

<u>6.4.6.c.i Grammar-learning strategies:</u>

★ Though it's good to have accurate grammar, don't worry if there are grammar patterns which you find difficult to learn, as full accuracy almost always takes a long while. A rough-and-ready command of grammar will get you understood, which is the main thing.

★ Some people find formal grammar exercises useful for getting the details right. But stop once they become boring: realistic speaking and writing activities practise grammar just as effectively.

★ If you feel that your coursebook doesn't cover grammar clearly or thoroughly enough, find a back-up source which does (a general coursebook or a specialised grammar-book: traditional school-books are often quite good here).

★ Look for similarities and differences in grammar forms and rules with other languages you know (including English)

★ Learn example sentences, not only rules: sentences from familiar reading texts or dialogues are best.

★ Home-made translation activities are useful. Try translating a (short!) English text into the foreign language one day, and then back into English the next day - or vice versa.

★ But in the end, you learn by grammar using it, e.g.
   • in reading - books, magazines, etc.,
   • in conversations.

### 6.4.6.c.ii Vocabulary-learning strategies:

★ Sources of new words and phrases besides the coursebook:
   • dictionary work (6.4.6.b above)
   • special vocabulary books
   • tourist phrasebooks
   • guessing from similar words in related languages (a technique that works more often than it fails!)
   • reading - once you can cope with longer texts without tiring - is an enjoyable and effective means:
      ✧ simplified readers

&#10022; "learner editions" of books: unsimplified, but with a glossary or parallel English translation

&#10022; "authentic" native-speaker texts: magazines, comics, books

- talking with native speakers (good for colloquial language and idioms) or even other learners.

- once you can cope with full-speed native-speaker speech: off-air cassettes or videos, satellite TV, feature films (your local Language Centre probably has a good range, often with worksheets).

★ Vocabulary learning, practice and testing strategies:

- listen and repeat: cassette dialogues, etc.

- make word puzzles, crosswords etc. - and solve them at a later date.

- translating 1-paragraph texts (e.g. newspapers): see Grammar strategies (6.4.6.c.i).

- see Memorisation: (6.4.6.b above), Discipline and organisation (6.4.4.b).

## 6.4.6.c.iii Writing strategies:

★ Writing is good for learning vocabulary and grammar, but is also an important skill in its own right.

★ Sources:

- extensive reading (see Vocabulary: 6.4.6.c.ii above)

- dictionary work (see 6.4.6.b above)

★ Practice activities:

- some learners recommend copying - but if you find it boring, do something more realistic!

- dictation: use the pause and replay buttons on a cassette recorder to write down a paragraph or so from an off-air or course-package recording.

- translation.

- write letters to native-speaker friends.

- creative writing: poems, write the next verse of a song, puzzles (solve later).

★ Non-Latin script:

- many people find new writing systems fascinating: once you get through the initial strangeness, you too could well get hooked!

- copying (see above)

- memorise non-Latin characters by making them into pictures that remind you of sounds - e.g. the Greek letter Γ (= G) looks like a Gallows.

&#10022; with Chinese and Japanese characters, there are books of ready-made cartoons (e.g. *Fun With Chinese Characters*: Tan, 1980): get hold of them.

## 6.4.6.d Listening skills

★ Listening is vitally important - don't be tempted to skip it!

★ It is usually the last of the four skills (reading, writing, listening, speaking) to reach survival level in, so don't worry if you find real-life listening quite hard for a long while.

★ Join your local university/college Language Centre or language lab: they usually have a wide variety of listening materials.

★ Listening-training activities are of two different types: controlled-speed and full-speed listening:

### 6.4.6.d.i Controlled-speed listening

★ This - a type of language-lab or cassette listening - is very much like reading:
- the language is already simplified and/or spoken slowly;
- you use the pause and replay button to slow it down further, or to repeat language input.

Use it for intensive grammar/vocabulary work, and for training listening skills if you cannot yet cope with full-speed native-speaker input.

★ Non-native speakers ("study-buddies" or more advanced learners) are easier to follow than native speakers - conversations with them make good listening practice.

★ Buy a walkman: they can be used anywhere.

★ Video gives an extra dimension, making understanding easier...

- if you find the visuals distracting, just watch the first time, and focus on the text the second/third/etc. time.

★ ...but audio cassettes can be used everywhere - and if you have a walkman, there's no fight for the family video player!

★ Transcripts of listening texts are useful - but make sure you practice listening without them as well.

★ It can sometimes take time to find texts whose speed and level is right for you (again, a language centre lab will give most range to choose from);

- don't always try to stretch yourself: listening to easy texts can be relaxing and motivating.

★ Listening is tiring at low proficiency levels: change activities after about 20 minutes.

### 6.4.6.d.ii Full-speed listening

★ This is listening to unsimplified, unstoppable language:
- real-life native speakers
- live radio/TV/shows
- authentic recordings without using the pause or replay button

★ Lower-proficiency learners:
- only listen to very short extracts where you know the key vocabulary,
- or use the pause/replay button to turn it into controlled-speed listening (again, short extracts only).
- use a transcript (if available) the first time; the second time, listen/view without the transcript.

- if face-to-face listening, don't waste time puzzling over unknown or forgotten items: hang on to the flow (people usually repeat things in different words anyway).

★ Higher-proficiency learners: once you feel you can cope with full-speed listening, at least on familiar topics, make it a mainstay of your learning programme:

- sources: video and audio cassettes (off-air and commercial), satellite TV, radio, songs, live shows, cassette letters from native-speaker friends

- select videos, etc. on topics that interest you personally

- use fast-frame searches to select bits of recorded programmes (e.g. news) that interest you the most

- in the foreign country, eavesdrop on native speaker conversation

- combine listening for pleasure with brief activities (20 minutes) using the text for vocabulary study

### 6.4.6.e Reading strategies

★ Reading - especially once you can cope with native-speaker texts - is an enjoyable way:
- of consolidating language learnt;
- if coupled with other activity-types, of building up general proficiency.

★ Sources:
- simplified readers
- learner editions of (unsimplified) books - using the glossary means you can read "above your level"
- authentic texts - comics, magazines, literature: they should be:
  - ✧ entertaining and/or interesting to you personally in terms of topic
  - ✧ easy enough to give you a measurable sense of progress (pages per day)

★ Techniques:
- join a foreign-language library (if available)
- set yourself goals (pages per week)

- read about familiar subjects, or read foreign-language versions of books you have read in English

- when visiting tourist sites/offices in Britain, ask for foreign-language brochures

- when abroad, read everything you see around you

- when starting on a non-Latin script, buy a newspaper and see how many characters or words you can decipher

- read with a dictionary, and note down new words for later memorisation or use in writing, etc.

  - ✧ change to non-dictionary work after about 20 minutes, as this is very tiring and can generate more new vocabulary than you can cope with

- if you know a related language, use that language to help you guess unknown words

- try reading aloud to native speaker friends or helpers

## 6.4.7 Advice structures

This was a distillation of advice from the learner-based studies in the present project. As mentioned earlier, there are different ways of bringing the advice to the learner: in a special "teach-yourself languages" handbook, as part of a teach-yourself package, or via a language-learning institution.

Of these three settings, the first is not analysed in any detail here (one is as well writing the book as writing about how to write it), and the second is integrated into the Package Design Guidelines (6.3). The third is addressed in the following section.

# 6.5 Recommendations for Language Centres

## 6.5.1 Introduction

This section looks at implications of the present studies for the role of the "language centre" in the classwork:self-instruction relationship. The recommendations are based largely on the findings of the present studies, contextualised by personal experience as a university language centre teacher and advisor; for reasons of compactness, they complement (rather than incorporate) other published recommendations (e.g. Dickinson, 1987).

I use "language centre" to refer to any institution or department of a larger institution which sees its task as enabling language learning by a combination of self-instruction/ self-access and classwork. Thus these recommendations potentially apply to:

★ the language centre proper - usually a service department of a college/university, whose brief is to offer language learning to all members of the institution:

- usually through a combination of classes in the most popular languages, back-up self-access/autonomous materials for these languages, and teach-yourself materials for a wider range of languages.

- in terms of facilities, the minimum tends to be a listening lab; and the maximum a fully-fledged self-instruction centre, with computers, video players, books, worksheets, "talk-shops", language-learning advisors, etc.

- facilities may be open to a wider public, whether via continuing education courses or independently.

★ private language schools

★ modern-languages departments in the secondary and tertiary sectors

I first look at the delivery of self-instruction per se to the learner, and then at the delivery of classes. Finally, I look at learner-training and support issues.

## 6.5.2 Providing self-instruction

### 6.5.2.a Introduction

Materials which a self-instruction centre needs to provide could be grouped into five basic types:

★ For the Phase 1 learner:

- teach-yourself packages

★ For the Phase 2 learner:

- a wide supply of authentic materials
- worksheets enabling intensive work on these authentic materials

★ For all:

- specialised language-study materials (published or home-made) focusing on grammar, vocabulary, pronunciation, etc.
- reference materials

### 6.5.2.b Choosing and using published materials

The Package Design Guidelines (6.3) can be used for selecting good teach-yourself packages, and for selecting or designing dedicated back-up materials. The ideal for each language should be to stock a range of different materials types which appeal to different learning styles and target groups, and which cover the full range of language skills. Thus, in a popular language, multiple copies of an up-to-date, all-round "communicative" package aimed at holidaymakers (but which glosses over the grammar) might be backed up with single copies of a grammar-translation course, in-house pronunciation materials, and a business-language course.

The physical form of delivery has major implications for a language centre in terms of equipment and staffing costs. The universality of audiotape requires a large number of listening stations. The growing importance of video, especially in autonomous work (see below), will almost certainly require individual playback stations. The growth of CALL and the potential of e-mail, the Internet and multi-media for language learning make

computer workstations a desirable feature - though their high cost and short working life means they represent a huge outlay in budget terms. In staffing terms, a combination of audio-visual and computer equipment usually requires both a hardware technician and a computing specialist.

In terms of user-friendliness, video and audio facilities present few problems, though perhaps the recent trend away from enclosed audio booths towards a more multi-purpose work-space might increase the embarrassment factor (cf. Discussion 5.5.3.b.iii). With computers, however, specialised attention needs to be paid to making a "user-friendly front-end" so that the novice user can browse and find programs easily.

Other issues and constraints are:

★ What proportion of a limited budget should be allocated to multiple course copies in the popular languages, and what proportion to making sure that as wide as possible a range of languages is offered?

★ With the less popular languages, should materials be bought just in case, or only on learner/teacher request? How many requests merit a purchase? What is the time gap between request and appearance on the shelf?

★ In the less popular and/or "exotic" languages, packages available may be poor in language-content and learning-methodology terms. Even if good packages exist, budget constraints will mitigate against regular updating of stock in a wide range of less popular languages.

★ If cassettes are not available for all courses, native speakers (e.g. overseas students) could be enlisted to make recordings of dialogues.

★ What are the staffing time and structure implications of all this?

### 6.5.2.c Autonomous materials

An autonomous materials bank should ideally contain some or all of the following:

★ off-air and published video and audio cassettes

★ newspapers, magazines, comics, books, literature (not only of the "worthy" type, but also popular/trashy)

★ activity-sheets and worksheets for:

- video/audio-cassette and reading-text work (generic worksheets are more efficient on staff time than text-specific ones)
- grammar and vocabulary development
- speaking activities

Issues/constraints here are:

★ costs of audio-visual playback equipment (see 6.5.2.b), but also satellite TV receiving and recording technology.

★ copyright restrictions on:

- conversion of published print media to worksheets
- off-air recordings
- multiple/back-up copies of published recordings

★ setting up satellite TV recording rotas & live facilities for potential user groups.

★ staff time: not only in running the centre, but in regular recording, materials updating and development.

### 6.5.2.d Referencing

Firstly, the language centre needs to provide language reference materials:

★ A decent to good bilingual dictionary for every language used:

- multiple copies of general dictionaries will be needed for popular languages
- specialist dictionaries (e.g. business, technical) could be bought on a teacher/ user request basis

★ Similarly, reference grammars - unless there are good summaries in coursebooks stocked.

- computer CD-ROM dictionaries have multiple search systems, and hence are especially useful for non-Latin scripts

Though the initial outlay may be moderately high, these materials would have a long shelf-life.

Secondly, there need to be referencing systems to the centre's stock. Computer catalogues have the advantage of flexible searches, but they may be more daunting to the ordinary user, even if a special catalogue terminal is provided for users. Paper catalogues (by language) are more user-friendly, but need regular updating.

Keeping catalogues up to date - especially of materials which are regularly renewed (e.g. satellite news) - is important for learner accessibility, but also represents a significant demand on staff time.

Open browsing facilities - books, magazines, worksheets and cassettes on open shelves - not only reduce the reliance on catalogues, but are more user-friendly in general. Unfortunately, they are also more thief-friendly.

### 6.5.2.e Other issues

Friendliness, helpfulness and accessibility on the part of the staff play a major role in student satisfaction - this is perhaps obvious, but is worth mentioning. With a small staff, however, it might be difficult balancing accessibility to users with the need to get on with cataloguing, stock and equipment maintenance, etc.

Long opening hours are appreciated by users. This, however, requires some staff to work unsociable hours; and working in an otherwise deserted building can have personal security implications.

Expense is a key factor for many users. Ideally, running costs of the centre should be met by central capitation rather than by user fees.

A self-instruction centre requires space. Not only on a macro level - e.g. whether there are enough work-stations to cope with peak capacity. But also at a micro level - e.g. a

user may be sitting in front of a multi-media work-station, but has the designer given her enough desk-space to open a book and write on a worksheet?

## 6.5.3 Class provision

This research project has highlighted the fact that the "ideal" learning path involves a combination of classwork and self-instruction. Most language centres offer both. In the popular languages, classes may range from beginner to advanced level; in the less popular languages, by contrast, there may be a few learners every year, but not enough to make even a beginner's class financially viable.

In claiming that classes are crucial at lower proficiency levels, but much less important at higher levels, this study suggests that it would be more sensible to focus class provision on the crucial beginner and elementary levels, and to channel post-threshold learners into supported self-instruction (see following sub-section). Savings made by not providing advanced French classes, say, could then be used to cross-subsidise smaller beginner/elementary classes for the less popular languages. This would mean that a greater proportion of language learners were supported where they need it most: in Phase 1 learning.

An argument against this is that learners of popular languages may not like having self-instruction forced upon them willy-nilly as they approach the intermediate threshold. A counter-argument would be that, at present, many learners of less popular languages have self-instruction forced upon them when they can cope with it much less, i.e. at beginner level. And ideally, of course, there should be classes for all who want them - just as budget constraints should ideally not exist. But this raises a wider issue, which I will now address: if learners have to use self-instructed techniques, whether in their own best interests or because they have no alternative, these techniques need training and support.

# 6.5.4 Training and support for self-instruction

### 6.5.4.a Training in the classroom

Teachers have always advised their students on memorisation techniques, etc.; but systematic approaches to strategy training are rare, and have only just begun to make their appearance in mainstream course materials (e.g. Ellis G. & Sinclair, 1989).

One approach would be to add a strategy-training overlay to conventional classroom activities (see e.g. Oxford, 1990). Another, as outlined in Fernández Toro & Jones (1996), is to add a distinct self-instruction training strand to the classwork syllabus, where the teacher plays an enabling role in providing goal-clarification, task-setting and self-evaluation materials, together with self-instruction consultations.

A more informal source of learner training is from class-mates or study buddies: indeed, some students may only accept teacher-given advice when passed on as a "tip" by peers (Fernández Toro & Jones). Within a class context, it might be possible to formalise the role of peer input, e.g. through learner-led discussions, or by setting up study-buddy pairs.

### 6.5.4.b Training and support in the self-instruction centre

The language centre, however, can - and should, I feel - also provide continuous training and support for its self-instructed users. Here are some possible channels (for more ideas, see Dickinson, 1987):

★ a photocopied study-training handbook given to every user on registration

★ a programme of short seminars, both specific ("improving your listening", or "learning advanced Spanish") and general ("how to teach yourself a language")

★ "tip of the week" posters and computer log-in messages

★ skill-specific posters (e.g. "tips for improving listening", or "how to teach yourself grammar")

★ adding an overt strategy-training element to worksheets, etc.

★ a computerised study-buddy database

★ a computerised native-speaker informant database: to consult, users must register as informants of their native language and of their professional/academic/hobby subject-area

★ a "language market" notice-board, e.g. for learning exchanges, study buddies or conversation lessons

★ a regular language-learning advisor surgery, with hours prominently advertised

★ "just in" posters for newly-acquired stock

★ a regular newsletter could also be a vehicle for many of the above

## 6.5.5 Conclusion

These, then, are some of the uses to which our map of the self-instruction experience can be put. A map, however, also serves to guide future explorers; this is discussed in the closing section of this work.

# 6.6 Future Explorations

## 6.6.1 Suggestions for Further Research

As outlined in the Introduction (1.1) and in the preamble to each individual study, the research methodology of the project was dictated by its exploratory nature. When exploring and mapping out a virtually unknown field, we need a maximally open-ended approach, for we do not know in advance which details are relevant and which are not. The result has been a set of wide-ranging surveys based largely on subjective accounts of the self-instruction process. The next step would be to focus down on certain key areas, but also to take a more tightly-controlled, hypothesis-testing rather than hypothesis-generating approach.

One aspect which such a technique would allow us to explore is the interaction between perceptions of success or language difficulty, say, and actual performance. For example, it would be useful to gain a more generalisable picture of the longitudinal process of self-instruction by reproducing the present Diary Study with a multi-subject study of groups of learners at different proficiency levels or learning different languages; ideally, measures would combine process (e.g. diaries) with product (e.g. externally-administered proficiency ratings and vocabulary-size tests).

The missing learning-time dimension needs closer investigation, whether by tracking groups in real time, as just suggested, or by more precisely-focused interview techniques to estimate weekly learning loads and overall length of learning (though recall problems could be an obstacle here).

Specific packages could also be road-tested on groups of learners giving their direct reactions to specific features: this would give designers highly usable information.

In learning-theory terms, the phase-threshold-phase model deserves closer investigation. This could be done by longitudinal studies; these, however, might involve several years' observation, which would put heavy demands on researcher time and funding.

## 6.6.2 Envoi

Thus we come to the end of our expedition, which has given us a clearer picture of a country where few researchers had previously ventured. To many learners, however, it is a well-travelled land. I thank those who shared their travellers' tales with me.

«Goodbye, come back again»

Raise your hand and wave towards yourself as though beckoning.

«Au revoir, à bientôt»

En partant levez la main derrière le dos et faites signe.

«Auf Wiedersehen, kommen Sie wieder zurueck»

Heben Sie die Hand und schwenken Sie diese, als wollten Sie winken.

Γειά χαρά.
Νà σᾶς ξαναδοῦμε

Yia hará.

Na sas xanathoómay.

«Adjö, kom tillbaka snart»

Höj handen och gör en gest mot er själv som om ni vinkar.

from Papas, 1985

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# Software

*Multimedia Chinese-English Dictionary.* CD-ROM disk. Beijing: Winmedia, 1994.

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# APPENDICES

# Appendix A3.I
# Packages Checklist Version 2: Filled-In Example

Rater's Name: ~~[redacted]~~

Course Title: _LEARN HUNGARIAN (3RD EDITION)_

**MATERIALS ANALYSIS CHECKLIST**

**Rater's information**

1. Make sure you have the Rater's guide ready: this explains any items which might be unclear. An asterisk (*) after a word in the checklist means that it is explained in the checklist: LOOK UP EVERY ASTERISKED ITEM if this is the first time you are using the checklist.

2. Instructions are given in CAPITALS. Generally, you will be asked to tick boxes; sometimes you may be asked to enter a figure. Ignore the numbers on the right: these are to help my analysis.

**1  Language-contrastive* factors**

IN SECTION 1, TICK ONE BOX PER QUESTION

**1a. Phonology**

.1 Phonemes:
- □ Most TL* phonemes are similar* to ones in English
- ☑ Many TL phonemes are different* from ones in English
- □ (Don't know/undecided)

.2 Rhythm
- ☑ TL words have stressed and unstressed syllables*
- □ TL words have a weak* or non-existent* stress pattern
- □ (Don't know/undecided)

.3 Tone
- ☑ The TL only uses sentence-level intonation*
- □ TL words have typical intonation-contours*
- □ The TL is a tonal language*
- □ (Don't know/undecided)

**1b. Script**
- ☑ The TL uses a roughly phonetic* Western script
- □ The TL uses Cyrillic or Greek script*
- □ The TL uses a phonetically-inconsistent* Western script
- □ The TL uses a roughly phonetic non-European* script
- □ The TL uses an ideographic* script
- □ The TL script combines ideographic & phonetic elements
- □ (Don't know/undecided)

**1c. Lexis***
- □ Many TL words are recognisably similar to English words*
- □ Some TL words are recognisably similar to English words*
- ☑ Few if any TL words are recognisably similar to English words
- □ (Don't know/undecided)

**1d. Grammar**

.1 TL grammar is:
- □ mainly analytic*
- □ a mixture of analytic and synthetic* elements
- ☑ mainly agglutinative*
- □ strongly synthetic
- □ (Don't know/undecided)

.2 TL word-order is:
- □ generally English-like*
- □ SVO but with non-English-like variants*
- ☑ non-SVO*
- □ (Don't know/undecided)

**2  Learning objectives**

**2a. Statement of aims***

Look for an introduction describing aims, "how to use this course", etc.

←IF THERE IS ONE, WRITE HOW MANY PAGES* LONG IT IS HERE  1

**2b. Learner target group**

.1 LSP*

TICK ONE BOX ONLY
- ☑ Course seems designed for general learners
- □ Course seems designed for specific learners

←IF YOU TICKED "SPECIFIC", WRITE THE LEARNER-TYPE HERE

.2 Group setting

TICK ONE BOX ONLY
- □ Course originally designed for self-study
- □ Course originally designed as back-up/self-access resource
- ☑ Course originally designed for classwork
- □ Multi-purpose/aim unclear

**2c. Claimed aims***

In the statement of aims (2b), which of the categories listed below are claimed to be Important aims (I), which are merely Mentioned (M) and which are Not Mentioned (NM) at all?

TICK ONE BOX IN EACH ROW. IF THERE'S NO STATEMENT AT ALL, TICK ONLY THE NM BOXES.

**.1 Language elements**

| | I | M | NM |
|---|---|---|---|
| Phonology | □ | □ | □ |
| Script | □ | □ | □ |
| Lexis | □ | □ | □ |
| Grammar | □ | □ | □ |
| Pragmatic function* | □ | □ | □ |
| Discourse structure* | □ | □ | □ |
| Culture* | □ | □ | □ |

**.2 Varieties**

| | I | M | NM |
|---|---|---|---|
| Different dialects/regional varieties* | □ | □ | □ |
| Different styles* | □ | □ | □ |
| Different registers* | □ | □ | □ |

**.3 Skills**

| | I | M | NM |
|---|---|---|---|
| Reading | □ | □ | □ |
| Writing | □ | □ | □ |
| Listening | □ | □ | □ |
| Speaking | □ | □ | □ |
| Paralinguistics* | □ | □ | □ |
| Translation | □ | □ | □ |

**.4 Process aims***

| | I | M | NM |
|---|---|---|---|
| Study-skill training* | □ | □ | □ |
| General cognitive development* | □ | □ | □ |
| Acculturation* | □ | □ | □ |
| General affective development* | □ | □ | □ |

**.5 Performance**

| | I | M | NM |
|---|---|---|---|
| Fluency | □ | □ | □ |
| Accuracy | □ | □ | □ |

**.6 Exit proficiency**

What proficiency, if any, is claimed for the learner after completing the course?

TICK THE NEAREST APPROPRIATE BOX (ONE ONLY):

- □ Command of (basic words and phrases only.
- □ Conveys and understands general meaning in a restricted number of situations only.
- □ Can handle basic situations, though with problems.
- □ Rough-and-ready command of good range of situations, though with many mistakes.
- □ Effective command of language, including some complex language, with some mistakes.
- □ Good command of language, including complex language, occasional mistakes.
- □ Very good command, very few mistakes or misunderstandings.
- □ Equivalent to educated native speaker.
- □ (Unclear/not mentioned)

**2d. Actual objectives***

Now look through the course itself. From the evidence of the texts and student tasks, which of the categories listed below seem to be Important (I), which seem Less Important (LI) and which do Not Occur (NO) at all?

TICK ONE BOX IN EACH ROW

**.1 Language elements**

| | I | LI | NO |
|---|---|---|---|
| Phonology | □ | □ | □ |
| Script | □ | □ | □ |
| Lexis | □ | □ | □ |
| Grammar | □ | □ | □ |
| Pragmatic function* | □ | □ | □ |
| Discourse structure* | □ | □ | □ |
| Culture* | □ | □ | □ |

**.2 Varieties**

| | I | LI | NO |
|---|---|---|---|
| Specific dialects/regional varieties* | □ | □ | □ |
| Specific styles* | □ | □ | □ |
| Specific registers* | □ | □ | □ |

**.3 Skills**

| | I | LI | NO |
|---|---|---|---|
| Reading | □ | □ | □ |
| Writing | □ | □ | □ |
| Listening | □ | □ | □ |
| Speaking | □ | □ | □ |

□ □ ☑ Paralinguistics*
□ ☑ □ Translation

.4 Process aims*

   LI  NO
□ ☑ □ Study-skill training*
☑ □ □ General cognitive development*
☑ □ □ Acculturation*
□ □ ☑ General affective development*

.5 Performance

   LI  NO
☑ □ □ Fluency
☑ □ □ Accuracy

.6 Exit proficiency

Look at the final unit. What proficiency level will the learner probably have reached on successfully completing the course?

TICK THE NEAREST APPROPRIATE BOX (ONE ONLY):

□ Knows some basic words and phrases only.  2
□ Communicates general meaning in a few restricted situations only.  3
□ Can handle basic situations, though with problems.  4
☑ Rough-and-ready command of good range of situations, many mistakes.  5
□ Effective command, including some complex language, some mistakes.  6
□ Good command, including complex language, occasional mistakes.  7
□ Very good command of all areas, very few mistakes.  8
□ Equivalent to educated native speaker.  9

## 3 Syllabus

### 3a. Organizing criteria

.1 Main syllabus-type*

Look through the whole book. What type of syllabus seems to provide the underlying skeleton?

TICK ONE BOX ONLY

□ Phonological*
□ Script*
☑ Structural*
□ Situational*
□ Functional*

□ Notional*
□ Skills/task (procedural)*
□ Multi-dimensional*
□ No discernable syllabus structure*

.2 Syllabus strands*

Which of the following areas are organised into coherent syllabuses running through all or part of the course?

TICK ONE OR MORE BOXES

☑ Phonology
□ Script
☑ Grammatical structure
□ Situations/settings
☑ Notions/lexical fields
☑ Language functions/style
□ Skills/tasks
□ Culture

### 3b Sequencing

.1 Sequencing criteria

What factors determine the order in which the main language items are supplied?

TICK ONE OR MORE BOXES

☑ Difficulty/complexity
☑ Utility/frequency
□ Storyline
□ Order seemingly random*

.2 Are syllabus topics recycled?*

TICK THE APPROPRIATE BOX(ES)

□ Yes - in special revision units
☑ Yes - in later units
□ No - the syllabus is completely linear

.3 Do individual language items seem deliberately recycled?*

TICK ONE BOX ONLY

☑ Yes
□ Rarely if ever

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**4 Role of materials**

**4a Make-up of the course**

.1 Levels*

TICK ONE BOX ONLY

☑ Single-level course
☐ Two or more levels

.2 Component types

TICK ONE OR MORE BOXES

☑ coursebook
☐ reference book
☐ workbook*
☐ live broadcasts*
☐ audio recordings*
☐ video recordings*
☐ CALL software*
☐ on-line CALL*

**4b Typical Unit size and gradient***

FOR THE REST OF SECTION 4, DESCRIBE ONLY THE "MIDDLE" UNIT* OF THE COURSE.

IN THIS SUB-SECTION (4b), FOR EACH QUERY WRITE THE APPROPRIATE NUMBER OF PAGES* IN THE SPACE ON THE LEFT

16  Length of whole unit
2  Number of pages of TL dialogue
3  Number of pages of TL prose
4  Number of pages with illustrations
4  Number of columns* of target vocabulary
10  Number of pages of language explanation*
3  Number of pages of learner activities*

**4c Text features:**

STILL LOOKING AT THE MIDDLE UNIT...

.1 Authenticity of dialogue or prose text:

TICK ONE OR MORE BOXES AS APPROPRIATE:

☐ At least some fully-authentic text* (including listening)
☑ At least some scripted but natural* text
☐ At least some old-fashioned or highly unnatural text
☐ (No suprasentential text* in this unit)

**.2 Illustrations**

TICK ONE OR MORE BOXES AS APPROPRIATE:

☑ At least some illustrations contextualize/explain* language points/activities
☑ At least some illustrations merely decorate
☐ (No illustrations in this unit)

**4d Language explanation***

STILL LOOKING AT THE MIDDLE UNIT...

**.1 Code**

TICK ONE OR MORE BOXES AS APPROPRIATE:

☑ At least some metalanguage* is in the TL
☑ At least some metalanguage is in English
☐ At least some metalanguage is iconic*
☐ (No language explanation in this unit)

**.2 Accessibility**

☑ Metalanguage uses specialist linguistic terms (if iconic, requires reference to a key)
☐ Metalanguage readily comprehensible by non-linguists
☐ (No language explanation in this unit)

**.3 Means**

☐ At least some inductive (discovery) work*
☑ All language points presented deductively*
☐ (No language explanation in this unit)

**4e Task features***

STILL LOOKING AT THE "MIDDLE" UNIT ONLY, TICK A BOX FOR EACH FEATURE WHICH OCCURS IN AT LEAST ONE PRESENTATION OR PRACTICE TASK.

**.1 Medium focus***

☐ Repetition*
☐ Memorization*
☑ Manipulation of TL form*
☑ Translation
☐ (No explicitly medium-focused tasks in this unit*)

**.2 Message focus***

☐ Reading/listening practice*
☐ Elicitation/interpretation of text details*
☑ Activity language use paralleling real-life language use*
☐ Problem-solving*

| | O | R | NM | |
|---|---|---|---|---|
| | ☐ | ☐ | ☑ | Teacher/class |
| | ☐ | ☐ | ☑ | Native-speaker informant* |
| | ☐ | ☐ | ☑ | Interaction with native speakers |
| | ☐ | ☐ | ☑ | Language-learning advisor* |
| | ☐ | ☐ | ☑ | Study buddy/learner group* |

**6   Last but not least**

6a   Big brother

IF THIS IS FIRST CHECKLIST YOU HAVE DONE, DID YOU CHECK EVERY ASTERISKED POINT AGAINST THE RATER'S GUIDE?

☑ Yes

☐ No

IF NO - GO BACK AND CHECK, JUST TO MAKE SURE!

6b   Over to you

If you have any comments about the coursebook (.1) or about the checklist (.2), please write them below. Thanks a lot for your help!

*A good coursebook for its day, especially for learners brought up on Grammar/Translation. This one is the best of the three Hungarian coursebooks I have, and was particularly useful when I had regular contact with the L2 environment.*

---

- ☐ Game structure*
- ☐ Roleplay/simulation*
- ☐ Integrated-skill activity*
- ☐ Learner personalization*
- ☐ Interpersonal communication*
- ☐ Work outside course framework*
- ☐ (No message-focused tasks in this unit)

**5   Relationship with the learner**

NOW LOOKING AT THE WHOLE COURSE...

5a   Learner autonomy

TICK ONE BOX ONLY

- ☑ Learner assumed to follow prescribed page-by-page route
- ☐ Learner follows general route with optional elements
- ☐ Learner free to select and sequence learning according to own needs

5b   Learner support

1.   Intrinsic support features*

TICK THE FEATURES CONTAINED IN THE COURSEBOOK

- ☑ Contents pages listing language points covered*
- ☐ Alphabetical page-index of language points/vocabulary*
- ☑ English→TL dictionary
- ☑ TL→English dictionary
- ☐ Separate grammar reference section
- ☐ Notionally-grouped glossary of words and phrases* (1 or 2 areas only)
- ☑ Notionally-grouped glossary of words and phrases (>2 areas)
- ☐ Full L1 translations of most or all presentation texts
- ☑ Exercise keys

2.   Strategy-development features

TICK THE FEATURES CONTAINED IN THE COURSE MATERIALS

- ☐ Needs analysis questionnaire
- ☑ Learner contract*
- ☐ Encouragement/feedback on progress*

3.   Advice and backup

Are the following features Offered (O)*, Recommended (R),   or Not Mentioned (NM)?

TICK ONE BOX IN EACH COLUMN

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# Appendix A4.i
## Sample diary page (facsimile)

1992. március 7.

① A Bánhidi könyvben: gyakran adják egy magyar szónak ⌣ nem a fő értelmét, de

*[margin: often / értelem = meaning (word); mind, intelligence]*

egy ritkát ("csatorná"-nál adják nem "channel" hanem "gutter").

*[margin: rare, infrequent]*

② Az írásnak sok id⌣őre szüksége van! Így gyakran nincs kedvem megtenni ⌢ egy írógyakorlatot. *(sic)* Azonban, az új szókincs jó forrása (szótármunka!!).

*[margin: do (PF) / I don't feel like... (+ inf /vmihez) kedv = mood / sonne (boiling → fermentation; spring -p/source)]*

1992. március 10.

① Úgytűnik, hogy könnyebb van, mondatokat vagy kifejezéseket megtanulni egyedüli szavakat helyett. A szótár ⌣ azoknak jó forrása!

*[margin: = phrase instead of (POSTP) → e helyett a könyv helyett; helyettem... egyedüli = single, sole]*

1992. március 11.

① A szótárt használtom azért, hogy találom a szók töveket. Érzem, hogy lassan sikerül ez: sok ⌣ "új" szó nem úgytűnnek ismeretlen.

② Az már nem olyan nehéz, hogy leírom a tanulónaplómot magyarul!

# Appendix A4.ii

## Sample diary page (translation)

| | (Vocabulary notes) |
|---|---|
| <u>7. March 1992</u><br><br>① In the Bánhidi book: they often give not the main meaning of a Hungarian word, but a rare one (for "csatorna" they give not "channel" but "gutter").<br><br>② A lot of time is needed for writing! Hence I often don't feel like doing a writing exercise. However, it is a good source of new vocabulary (<u>dictionary work!!</u>). | |
| <u>10. March 1992</u><br><br>① It seems that it is easier to learn sentences or expressions instead of lone words. The <u>dictionary</u> is a good source of these! | |
| <u>11. March 1992</u><br><br>① I used the dictionary for finding word-roots. I feel that this is slowly succeeding: many "new" words do not seem unknown.<br><br>② It is already not so difficult to write my learner diary in Hungarian! | |

# Appendix A5.i

# Transcript of learner interview (Subject S70)

I = Interviewer, S70 = Subject. Minor hesitations, self-corrections and repetitions not transcribed.

I: So.. it was number 70... 4th of Feb... [name]?

S70: Yep.

I: Male... postgrad... EFL... right - which languages have you learnt or attempted to learn in any particular way? Start out with the ones which you've learnt at school or in class.

S70: At school I did Latin and French up to O-level...

I: Yeah.

S70: And since then, Hungarian and a little bit of Dutch. Teaching myself or just taking whatever was available.

I: Yeah. Have you carried... with the Latin and French, have you continued learning it actively since school or...?

S70: Yeah, the French I've worked for a couple of summers in France.

I: Did you actually sort of try and teach yourself French or was it just a case of being in the country?

S70: It was a case of being in the country. I tried to read as much as possible in France. But mostly it was just being there and using it.

I: Yeah. I think we'll probably just call it a classroom language. How good is your French?

S70: Advanced schoolboy, I suppose. Or it was - at best. It's several years since I've had to use it, so....

I: So if you went back to France now, in a week or so, you know, this acclimatization, after this acclimatization, would you...?

S70: I think I'd feel fairly comfortable with the idea.

I: Is it sort of get by or is it sort of really feeling at home, feeling that you can talk about anything?

S70: Getting by but...

I: In a range of situations...

S70: Yeah, in a range - like, kind of, slightly more than getting by, probably - it's not feeling comfortable by any means.

I: Yeah.

S70: At its best - well, I had to deal with - I was, like, a courier for one of those camping firms...

I: Yeah.

S70: I had to deal with business people and doctors and that kind of thing..So that probably is getting by, but in a wider range than...

I: Yeah... It's just sort of whether it is intermediate or advanced, really.

S70: Intermediate.

I: Yeah. That's what I was suspecting. What about your Latin - have you kept it up?

S70: No. I'd like to say I read my Virgil regularly, but I don't.

I: A smattering, shall we say?

S70: Yeah.

I: So, Hungarian and Dutch - you've got four languages?

S70: Yeah, I suppose so.

I: Yeah. Let's look more closely at the details of the... well, let's start with the Hungarian. You've lived in Hungary, is that right?

S70: For two years, yeah.

I: Yeah. And did you start out - you started out teaching yourself, or what? Did you take classes as well, or...?

S70: It was a kind of unsatisfactory mix. I got hold of a book at the beginning - you might know it, I can't remember: it's the big one, written by the Hungarian Ministry of Education.

I: Oh, is it the big orange one, the Bánhidi?

S70: Yep. And in my first year I had a couple of lessons, but they kind of went by the wayside, I'm not sure why - because the people at the school I was at didn't really want to teach it. So after that, I kind of got some of the kids to try to help - but they weren't terribly good. And so most of it was just picking bits and pieces up and making a kind of rather desultory effort to learn it myself. In the second year I moved schools and started off with some more regular and better teaching, and I took the book home - it was a different book by this stage - and probably spent two or three months trying, but not particularly hard and not as well as some people did, but fairly hard to get hold of it.

I: Yeah. Are you still learning Hungarian?

S70: No, I've stopped.

I: Would you say you're at the get-by stage?

S70: Beginner get-by - yeah, just... I really found that the times I knew that I was happy enough using it, but that's kind of the functional things: travelling, shopping, food.

I: Yeah.

S70: And in those, and also sport, 'cause I had to use it with sport - so in those narrow areas, then, it was get-by, in other things it was a kind of panic.

I: Yeah. Would you say your learning was successful?

S70: No. Oh - only successful in those kind of fairly narrow parameters.

I: Yeah - I mean do you sort get a feeling that, you know, given the amount of work you put in that, you know, it was successful or not? Or is it sort of so-so?

S70: I'd say it was probably unsuccessful - with too many stops and starts, and I never really felt comfortable with what I did know.

I: Yeah.

S70: And also, I found... I'm not sure if... I just found the pronunciation so difficult, that try as I might, I could never even master the simple vowel sounds, or...

I: Yeah. What about Dutch? You ever lived there, or is it a case of holidays?

S70: I spent a couple of months there over the summer, in which time - it was probably more or less the whole summer, but with leaving, going back, leaving, going back, so probably about eight weeks in Amsterdam.

I: Yeah. Now, have you sort of actively taught yourself or... Dutch?

S70: Yeah, that was just teaching myself, with the aid of... I can't remember - it was Hugo's Teach Yourself Dutch, if that means anything, it's...

I: So the Hugo book? Rather... there is actually the Teach Yourself series as well - the black and yellow Teach Yourself books. It was Hugo, was it?

S70: It was Hugo, whatever, yeah.

I: Oh, sorry - just while we're on the subject of books, you mentioned that you switched books in Hungarian. Which book did you switch to?

S70: I can't remember the name - it was written by an Englishman...

I: Was it Colloquial Hungarian...?

S70: Yeah, that's the one.

I: Yeah.

S70: Which struck me as being a lot better and more useful for - you know, it was more what I expected, I think, from a teach-yourself course.

I: Yeah. Could I sort of ask you a bit more about that in a minute? You still teaching yourself Dutch?

S70: No, I've stopped.

I: How good were you?

S70: Probably I got to the same level in Dutch as in about a twelfth of the time, so a similar kind of ?feeling...

I: Yeah.

S70: I was better at reading Dutch than I ever was at Hungarian. But I found that I very rarely got to speak it, mostly because everybody spoke such good English.

I: Yeah.

S70: So I could read, I could start reading with a dictionary the Volkskrant or sports articles or whatever. Slowly, but fast enough to get something out of it. In terms of speaking, even in shops - I know you found it different, but I found it was, if I said anything then people would be happy to speak English.

I: Yeah.

S70: Maybe that's Amsterdam...

I: Yeah.

S70: But certainly in terms of reading it was more advanced than the Hungarian ever got to be.

I: Mmm. Yeah. So would you regard your learning of Dutch as a success, then?

S70: Yeah, given that I didn't do it for very long, I was quite happy with it.

I: Yeah. Okay...

S70: But then it was obviously much easier because of all the transfer from English - it just wasn't particularly hard at all to read.

I: Yeah, so do you mind if I look briefly at the features of the actual materials you used? You said you used firstly the Bánhidi book on Hungarian, and then you found Colloquial Hungarian more useful.

S70: Mmm.

I: Mmm. Will you tell me about the Bánhidi book - any positive points, negative points about it?

S70: I can remember the negative points quite well, as I've said...

I: Yeah.

S70: It just seemed to throw lots of information in a not particularly coherent way. I remember you talking about széles - is it wide or is narrow? I found that the problem all the way through because it taught things in pairs, like the ki- and be- prefixes. And it took me months to sort out which means 'in' and which means 'out', and I think I've forgotten now, and I just know that one of them means 'in' and one means 'out'.

I: Yeah.

S70: And ?it seemed to do that all the way through.

I: Anything else about the book which you liked or disliked?

S70: Another dislike was the assumptions it made about pronunciation. Perhaps because there weren't any tapes or anything with it, that I found it very difficult to use what I had putatively learnt. Which is quite

discouraging - because I mean it's a big problem with motivation all the way through anyway. Because initially I thought I was only going to be there for a year, which I think probably would have... if I'd known I was going to be there for two years I might have made more of an effort at the beginning. But I found that if I couldn't use what I had learnt successfully, which I couldn't really do, then it's hardly an incentive to go on and do more.

I: Yeah... So... you mentioned certain assumptions with pronunciation.

S70: Yeah. I mean, I can't really be much more specific than that, or it just gives the kind of list: this is the vowel, this is how it's pronounced, but...

I: Yeah...

S70: ...without somebody there to tell me what I was doing wrong - or, no, there are plenty of... my students were all too keen to tell me what I was doing wrong, but I found it very difficult to find the right way of doing it. And also, that was by the Balaton, so even in the shops and bars or whatever, people would kind of speak German - or assume I was German and speak it... or have enough English to get by.

I: Yeah.

S70: So there wasn't even that kind of immediate necessity to use it.

I: Mmm. Yeah.

S70: And again, because it was a dual-language school, that meant all the staff, and the students, spoke English, which was lots better than my Hungarian.

I: Yeah. So that's... Is there anything else you wanted to say about the Bánhidi book? What about... you said you found the Colloquial Hungarian more useful? Would you like to explain me that?

S70: Yeah, from what I can remember - it seems quite a long time ago now, but it started at the start and went on in quite a sensible way. I can't remember what the first lessons are - there's a bit of real text, a bit of real conversation, and kind of at the same time, I supppose it was rather like Cambridge English or something, it had the kind of basic grammar, which at that point I needed to revise anyway, right in the first lessons, and that gives you the sense that you actually know what you're doing, and why you're doing it. And that it's useful in some way as well.

I: Sorry - what's useful?

S70: Well, because it's real text, or it's kind of real situation ?? in a way.

I: Yeah.

S70: I think it's probably shops the first one, again, which was the kind of stuff I knew by that point, but it was to - I still needed to have it ordered.

I: Yeah. You said real conversation - does that mean conversation you're listening to and reading conversations, or that you're able to converse?

S70: It means with the book that you're just reading real conversations, but at that time I was... one of the... it was the librarian, in fact, of the school I'd moved to gave me a couple of hours every week, so she would...

I: Oh, yeah?

S70: ...use the similar kinds of structures.

I: What was she doing? Was it sort of formal teaching, or was it sort of conversation class, or...?

S70: It was a kind of mixture, it was a bit of formal teaching from the book, and then just conversation practice based on that. Which seems to have - both at the time and retrospectively, it seems a good way of going about it.

I: Yeah.. This was a colleague, was it, or...?

S70: Yes, it was.

I: Yeah... What about the - or was there anything else you wanted to mention about Colloquial Hungarian?

S70: Not particularly - no, it had... what else was it? - it had the writing, kind of graded writing at the back, which was on...

I: Graded writing?

S70: Yes, starting off with easy texts and moving up as you go through.

I: So you're actually writing more and more difficult texts?

S70: Writing, yeah - and graded reading as well. Which I... it was really important, because you get... what I missed with the first attempt was a sense of making any kind of progress...

I: Yeah...

S70: It was kind of institutionalized in the book - in the second book.

I: Oh, it ?seemed... Yeah.

S70: Which I suppose... I'm not sure if I thought this way at the time, but that was why the second go was more successful because it was kind of a new... that it was more successful, I could tell.

I: Mmm.

S70: I could tell that I understood more, and I could use it a little bit more.

I: Yeah. Then you used the Hugo's Dutch. What did you think to that?

S70: I think that it's based on similar principles to the Colloquial Hungarian. It had...

I: So does that mean it's good, or...?

S70: Yeah, it was okay. It had... it used tapes a lot more - in fact, Colloquial Hungarian didn't have tapes. And that was okay, and the listening was... Oh, actually, and the tapes were strange, it was the only... I spoke Dutch most when I was speaking back to the tapes... Yeah,

it was structured again, you only ever say the *same* thing to the tape *once*, and you only ever hear the same things, but that was good.

I: Yeah...

S70: But I think maybe because, when I first learnt languages, it was just a very academic, pretty old-fashioned kind of way, and also I never got over the feeling that it was slightly strange listening to the tape with some bloke saying "Has the farmer got a ?lion in the garden?", and that always struck me as a little bit odd.

I: Yeah, talking to a tape, mmm. Yeah... So do you feel embarrassed, or...?

S70: Yeah, I think so - even if it's kind of one of those peculiar embarrassments where it's kind of self-contained, where there's nobody else around anyway.

I: Yeah. Anything else about the materials, that you haven't mentioned?

S70: Yeah - the Colloquial Hungarian was better for writing exercises than Hugo's Dutch. More of it. And, I'm not sure how, but kind of seemed more stretching. So it did a little bit more with... seemed to go a little bit quicker.

I: Yeah... So you were going through the exercises quicker, or you sort of felt you were progressing quicker, or what...?

S70: I think perhaps it was making me work more than the Hugo's - but that might be because Hungarian is harder, or more foreign, than Dutch. I'm not sure - it would be interesting to go back and compare the books - that's what I reckon.

I: You mentioned sort of strategies, techniques, there are: sort of reading newspapers, you've got some sort of teaching and conversation practice from a colleague... Are there any other strategies that you used that you think are...?

S70: Yeah, something which... I started to feel more and more at home the more I could read adverts - so that when the first time I landed in Budapest, it was just a... I was lost. Then gradually... I remember in the first stage just starting out reading shop signs. Then moving on to adverts. And headlines, flight posters, that kind of thing, so that kind of gradually I used just all the kind of little bits of language you see around...

I: Yeah.

S70: And it was mostly because I lived a half-hour bus and metro ride away from the city centre, which I used to go into virtually every day, so I'd kind of kill time by reading the adverts, and I was...

I: Yeah...

S70: ...trying to leaf through newspapers.

I: Yeah.

S70: And also I was, ?hard to think, probably trying to overhear conversations on the metro as well, ?it was an interesting thing as well,

so I could kind of occasionally try to listen in. More to kids than - it was particularly useful ?? there were young kids around.

I: Yeah. Any other techniques you used in your Dutch or Hungarian? ?Any strategies?

S70: With the Dutch it was far more a matter of reading newspapers, which was what I was interested in.

I: You mean you were interested in finding out the information...

S70: Yeah.

I: ..or you were interested in using it to learn Dutch?

S70: ?It'd be in finding out the information. As the alternative to spending three guilders twenty-five a day on the Guardian...

I: Yeah.

S70: ...or getting yourself to the local library.

I: Yeah. Is there anything else in the strategies area, or...?

S70: Well, I did try with Dutch to speak to my girlfriend, and people who were kind of close, her sisters and friends and so on, but's that always - it always, always failed because it just becomes too frustrating when you're using a language which is... when you've both got much better English. It kind of never seemed to work at all.

I: Yeah...

S70: To try and speak Dutch.

I: Yeah, I can understand that. So, is that it for strategies or whatever?

S70: Yeah, I think it probably is.

I: Are there any... Just sort of looking at other, just any other factors which we might have missed out: you mentioned, well, factors which helped your learning were, I think specially with Dutch, that Dutch is easier than Hungarian because you could use transfer from English.

S70: Yeah.

I: Is there anything else which helped your learning of either language, ?other than that you've mentioned already?

S70: I think there isn't particularly.

I: No?

S70: No.

I: Any...? Now I think I'll just sort of tell you the things that you mentioned which hindered your learning - I mean, apart from the materials, Hungarian was difficult to pronounce, in that you got by in both Holland and Hungary with other languages you knew...

S70: Yeah, very much so.

I: That reduced the opportunity and the need for speaking.

S70: Mmm.

I: And also you mentioned the fact about motivation in Hungary – that you thought you were going to be there for one year, and...

S70: Yeah – that was definitely a factor, that. And also I remember you talking before about the kind of ghettoization, how far do you get in the ghetto, and it was curious in the first year: I was nearby the Balaton, where there were only four other English speakers, or native English speakers...

I: Yeah.

S70: ...and which I assumed before would force me out, but it had almost the reverse effect, that we just kind of isolated ourselves. I'm not sure if that was inevitable: it was partly... it was a weird kind of school anyway. And of the four, one had had a previous year in Hungary and had been very successful in learning and was virtually fluent after a year, but the rest, we all made these kind of rather dilettante efforts to learn, and then kind of sank back into our shared Englishness.

I: You said the school wasn't very good – did you think that was an influence on your language learning?

S70: Yes, very much so, because...

I: Why was that?

S70: There was a problem... the school had been in turmoil, there was a huge turnover of staff, four of which were British Council people, and we were earning sterling, and the Hungarians were earning forints, and that sort of ?made a big difference, and – well, they were perfectly friendly, and we also were perfectly friendly, ?though there always seemed a barrier between the English and Hungarian staff. And partly it was because the head teacher was a duplicitous so-and-so, would play the English off against the Hungarians, and vice versa, and that might be some of it – or at least the Hungarian staff were deeply unhappy with him: I'm not sure if somehow we were seen as an extension of his...

I: Yeah.

S70: ...his reign. I mean, it was a kind of politically complicated place.

I: Yeah.

S70: Which ?meant that for – what was it, a boarding school, with all the teachers living in the town, there was remarkably little social contact.

I: Between?

S70: Between the English and the Hungarians. Which I still really can't explain to myself all that well.

I: Yeah.

S70: But that meant again, for instance, in the Budapest school, the second one, people were prepared a ?right away either to speak Hungarian to you if you wanted or to give up an hour or so of their time to teach it if you wanted – but not in the first school.

I: So that was a positive factor?

S70: Yeah, in the second one, yeah absolutely.

I: Okay – have we missed anything, or...?

S70: Well, I think that's probably it.

I: Well, right – thanks very much then.

S70: Right, well – thank you.

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# Appendix A5.ii
# Fair copy of interview protocol (Subject S70)

Full/070

### Language Experience Questionnaire Mark 5A(Full)

**Individual details**

1 Date:                                                                 4 |Feb /974

2 Name:                                        (see original)

3 Sex:                                                                              (M)/F

4 Status:                                        UG/(PG)/staff/ContEd/public

5 Department/ professional field:            EFL teacher

6 Interested in going on NS-informant/studdy-buddy database? If so, which languages?

                                                      ⟶                    (Not interested)

7 Contact no/address:                (see original)

8 Available for/till:                                                   July '94

9 Interested in casestudy project next year? If so, which languages?

   Existing LL: _____ ⟶ _____ (New LL): __any__ /Not interested

**Classroom languages (double-code if TYS element)**

| 10 Lang name | Latin | French | ⟶ |
|---|---|---|---|
| 11 (Exit) command | (Elel)/Int2/Adv3 | Elel/(Int2)/Adv3 | Elel/Int2/Adv3 |

**Naturalistically-acquired languages**

| 12 Lang name | ⟶ | ⟶ | ⟶ |
|---|---|---|---|
| 13 Acqun age | Ch/Adu | Ch/Adu | Ch/Adu |
| 14 Command | Elel/Int2/Adv3 | Elel/Int2/Adv3 | Elel/Int2/Adv3 |

**Attempted TYS language(s)**

| 15 Lang name | Hungarian | Dutch |
|---|---|---|
| 16 TLEnv use | x hols/ m ext. stay residence | x hols/2+m ext. stay |
| 18 Means (cla/TYS) + progression | t + c | t |
| 19 Still TYSing? | Y/(N)/class | Y/(N)/class |
| 20 (Exit) comm'd | Elel/(Int2)/Adv3 | Elel/(Int2)/Adv3  (perhaps: Elel ??) |
| 21 Learning = | success/soso/(failure) | (success)/soso/failure |
| 22 Packages +series title +bk/cass/vi/CALL | -Bánhidi - Colloquial | — Hugo's |

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23 Positive materials features (give package)

<u>Colloquial Hung</u>. more useful (than Hugo [→24]), no cassettes [cf. 24]; also better for writing, more of it, stretching, going quicker: working more; sensible structure; real text, real "conversation", basic grammar → revision, know what you're doing + why; useful: real texts, real situations - e.g. Shops (Unit 1); also graded writing tasks, graded reading, gave sense of progress. <u>Hugo</u>: ok: tapes - speaking practice, well structured, predictable; tho' slightly "odd" (embarrassed) talking to a tape.

24 Negative materials features (give package)

<u>Bánhidi</u>: lots of information, not particularly coherent - széles = wide/narrow - antonymic pairs: difficult to unscramble; pronunciation: assumptions (<u>soundlist</u> - no feedback re. mistakes) (no tapes) - difficult to use what was "learnt" → demotivating; no sense of progress.

25 Own activities/strategies/"tips"

- reading (especially Dutch, especially for intrinsic information), with dictionary, newspapers, shop signs, adverts, headlines : "feeling at home", kill time by reading on journey to work in Hungary → overhear conversations, listen in (intrinsic interest), especially to children.
- native-speaker colleague: formal teaching from book + conversation practice.
- speaking to partner + family, but failed (English = better for both [→27]).

26 Other positive factors re own learning (TL-based, individual factors, etc.)
- Dutch: transfer ex English, especially reading
  Dutch: easier than Hungarian

  in other Hungarian schools, colleagues ready to speak Hungarian if wished.

27 Other negative factors re own learning (TL-based, individual factors, etc.)
- Hungarian: pronunciation difficult
- German/English known in Hungary/Holland - little opportunity for speaking → low need; also because dual language workplace.
- motivation problem Hungarian: initially thought only there for 1 year : important:

28 Dump for unplaceable comments, generalizations, etc. isolated himself with other L1 speakers — school working

Dutch: reading OK - learnt quickly [cf. 26].

at: poor working environment, difficult atmosphere, barrier NS/L1 staff → little social contact L1/NS users.

# Appendix A5.iii
## Printout of database card (Subject S70)

NAME: (S70)          SEX: m                     TRAWL: S70

NUMBERS: CL ONLY:2 + NAT:0 + ALL TYS:2 = TOTAL LANGS:4

LANGS: CLASS ONLY: lat 1, fre 2       NAT ONLY: n

TYS1: NAME: hun  TLEN: r       mEANS: cat
      STILL LEARNING? n      EXIT COMMAND: 2     SUCCESS? n

TYS2: NAME: dut  TLEN: r       MEANS: t
      STILL LEARNING? n      EXIT COMMAND: 2     SUCCESS? y

NOTES:
+MAT: Coll hun [PUBL] useful: graded, "stretching" WRITing, READing
tasks [INPU: Level; GRADient], fast Pace, hard Work [DISC] >> sense of
Progress [ASSE], Revision [TECH]; sensible Structure [USAB]; Realistic
texts, Dialogues; basic GRAMmar; useful situational Syllabus. Hugo ok:
Ca [CMPT]: SPEAking well Structure d, predictable, though...

-MAT: banhidi hun: lots of info [INPUt], not v coherent [USAB: Clarity];
antonym pairs confused [Structure]. no Ca [CMPT] >> Pronunciation [SPEA]
soundlist [ipa] difficult to use, no Feedback [ASSE] re mistakes >> de
MOTIvation; no sense of Progress. ..."odd" [MOTI: Confidence: embarrassing]
SPEAking to Ca [CMPT].

STRATEGIES: READing (esp dut) with Dictionary [TECH], esp for Intrinsic info
[ENJO]: newspapers, signs, adverts; LISTening in to conversations, esp
children: filling journey Time [DISC], Intrinsic i; Ns colleague: Teacher
[CLASs], Conversation [SPEA]. Speaking to Ns partner [PEOP: relative], her
family, but...

OTHER +FRS: XLANg l1>>l2 (eng >> dut), esp in READing; dut easy
[Learnability] >> fast learning. Ns colleagues [PEOP].

OTHER -FRS: ...Ns partner, relatives; Country [PEOP]: l1, l3 known [MOTI:
Need] >> few SPEAking opportunities. hun: MOTIvation low (prospective
residence = short), l1 (not l2) friends, poor job atmosphere (little ns
contact). hun: Pronunciation [SPEA] difficult.

| **Key** | | |
|---|---|---|
| TYS = Solo/Mixed language(s) | n = none | TLEN = country experience |
| r = residence   cat = parallel class-only + self-instruction, t = self-instruction only | | |
| PUBL = *PUBLISHERS* | INPU = *INPUT* | |
| DISC = *EFFORT/PLANNING* | ASSE = *ASSESSMENT* | |
| TECH = *STRATEGIES* | USAB = *USABILITY* | CMPT = *COMPONENTS* |
| ipa = phonetic symbol system | MOTI = *MOTIVATORS* | |
| PEOP = *PEOPLE* | XLAN = *LANGUAGE-CONTRAST* | |

# Appendices A5.iv - A5.xx

# Multivariate Tables

### Appendix A5.iv

**Sex:** Discriminant Analysis Tables;

**1. Independent Variables: GROUP** *Mention* **and** *Quality*

| A. DISCRIMINATORY POWER OF FUNCTION | |
|---|---|
| | Function 1 |
| A1. %age of dataset variance accounted for | 100.00% |
| A2. Canonical correlation | .44 |
| **A3. Mean Values per Category on Function Scale[84]** | |
| | Function 1 |
| women | -.43 |
| men | .54 |
| **B. MAKEUP OF FUNCTION** | |
| **B1. Suggested Name** | |
| | Function 1 |
| | - |
| **B2. Key-Variable:Function Coefficient Matrix** | |
| | Function 1 |
| *CLASS Quality* | -.70 |
| *MOTIVATORS Mention* | .59 |
| *READING Quality* | -.56 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations $\geq$.40 only)** | |
| | Function 1 |
| *CLASS Quality* | -.64 |
| *READING Quality* | -.59 |
| *READING Mention* | -.54 |

---

[84] In the thesis text, this data is shown by the Graph rather than in the Table proper.

## 2. Independent Variables: Keyword *Mention* and *Quality*

| A. DISCRIMINATORY POWER OF FUNCTION | |
|---|---|
| | Function 1 |
| A1. %age of dataset variance accounted for | 100.00% |
| A2. Canonical correlation | .58 |
| **A3. Mean Values per Category on Function Scale** | |
| | Function 1 |
| women | -.62 |
| men | .78 |

| B. MAKEUP OF FUNCTION | |
|---|---|
| **B1. Suggested Name** | |
| | Function 1 |
| | - |
| **B2. Key-Variable:Function Coefficient Matrix** | |
| | Function 1 |
| *(INPUT:) Authentic/Realistic Mention* | .64 |
| *(PEOPLE:) StudyBuddy Quality* | -.63 |
| *(READING:) Reading Quality* | -.61 |
| *(SPEAKING:) Speaking Mention* | .49 |
| *(CLASSWORK:) Class Quality* | -.45 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations $\geq$.40 only)** | |
| | Function 1 |
| *Class Quality* | -.44 |
| *Reading Quality* | -.43 |
| *Reading Mention* | -.43 |

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## Appendix A5.v

### Learner-Profile Variables: Factor Analysis Table

### (n = 55: excluding no Class-Only languages subjects)

| | A. Sampling adequacy | | | .53 |
|---|---|---|---|---|
| **B. Percentage of Dataset Variance Accounted For** | | | | |
| | **Factor 1** | **Factor 2** | **Factor 3** | **Factor 4** |
| Per Factor | 28.0% | 20.9% | 13.4% | 9.9% |
| Cumulative | 28.0% | 48.9% | 62.3% | 72.2% |
| **C. Variable:Rotated-Factor Correlation Matrix (correlations >.40 only)** | | | | |
| | **Factor 1** | **Factor 2** | **Factor 3** | **Factor 4** |
| *Solo/Mixed Initial Learning-Means Profile* | .81 | | | |
| *Solo/Mixed Failure Profile* | .77 | | | |
| *Solo/Mixed Maximum Command* | -.75 | | | |
| *Solo/Mixed Dropout Profile* | .62 | | | |
| *Class-Only Language Count* | | .91 | | |
| *Class-Only Exotic Experience* | | .83 | | |
| *Total Language Count* | | .57 | .72 | |
| *Class-Only Maximum Command* | | .51 | | |
| *Solo/Mixed Language Count* | | | .95 | |
| *Solo/Mixed Exotic Experience* | | | .75 | |
| *Solo/Mixed Maximum Country Experience* | | | | .87 |
| **D. Suggested Names** | | | | |
| | **Factor 1** | **Factor 2** | **Factor 3** | **Factor 4** |
| | Learning-Means Effects | Class-Only Languages | Self-Instructed Experience | Environment Effects |

## Appendix A5.vi

*Class-Only Exotic Experience*: Discriminant Analysis Table;

### Independent Variables: Learner-Profile

(excluding *Class-Only Maximum Command*, *Class-Only Language Count*)

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 97.59% | 1.41% |
| A2. Canonical correlation | .81 | .21 |
| **A3. Mean Values per Category on Function Scale** | | |
| | Function 1 | Function 2 |
| no Class-Only languages | -1.80 | - |
| Romance/Germanic only | .11 | - |
| non-Romance/Germanic experience | 3.59 | - |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | - | - |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *Total Language Count* | 1.71 | - |
| *Solo/Mixed Language Count* | -1.71 | - |
| *Solo/Mixed Exotic Experience* | .51 | - |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| *Total Language Count* | .50 | - |

## Appendix A5.vii

*Class-Only Maximum Command*: Discriminant Analysis Table;

Independent Variables: Learner-Profile

(excluding *Class-Only Exotic Experience, Class-Only Language Count*)

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 98.62% | 1.38 |
| A2. Canonical correlation | .64 | .10 |
| **A3. Mean Values per Category on Function Scale** | | |
| | Function 1 | Function 2 |
| no Class-Only languages | -1.42 | - |
| beginner | -.10 | - |
| intermediate | .58 | - |
| advanced | .97 | - |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | - | - |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *Total Language Count* | 1.55 | - |
| *Solo/Mixed Language Count* | -1.19 | - |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| *Total Language Count* | .64 | - |

## Appendix A5.viii

*Total Language Count*: Discriminant Analysis Table;

Independent Variables: Language-Profile

(excluding *Class-Only Language Count, Self-Directed Language Count*[85])

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 95.05% | 4.95% |
| A2. Canonical correlation | .73 | .24 |
| **A3. Mean Values per Category on Function Scale** | | |
| | Function 1 | Function 2 |
| 1 language | -2.71 | |
| 2 languages | -.52 | |
| 3-10 languages | .68 | |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | - | - |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *Solo/Mixed Maximum Command* | .89 | - |
| *Class-Only Exotic Experience* | .85 | - |
| *Solo/Mixed Initial Learning-Means Profile* | .55 | - |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | | |
| | Function 1 | Function 2 |
| *Class-Only Exotic Experience* | .66 | - |
| *Solo/Mixed Maximum Command* | .45 | - |

---

[85] Non-independent.

Appendix A5.ix

*Solo/Mixed Language Count*: Discriminant Analysis Table;

Independent Variables: Language-Profile

(excluding *Total Language Count*[86])

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 99.71% | 0.29% |
| A2. Canonical correlation | .69 | .05 |
| A3. Mean Values per Category on Function Scale | | |
| | Function 1 | Function 2 |
| 1 language | -.73 | - |
| 2 languages | .30 | - |
| 3-6 languages | 1.82 | - |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | - | - |
| B2. Key-Variable:Function Coefficient Matrix | | |
| | Function 1 | Function 2 |
| *Solo/Mixed Maximum Command* | .94 | - |
| *Solo/Mixed Exotic Experience* | .72 | - |
| *Solo/Mixed Initial Learning-Means Profile* | .81 | - |
| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| *Solo/Mixed Exotic Experience* | .58 | - |
| *Class-Only Language Count* | .46 | - |

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[86] Non-independent.

## Appendix A5.x

*Solo/Mixed Exotic Experience*: Discriminant Analysis Table;

### Independent Variables: Learner-Profile

| A. DISCRIMINATORY POWER OF FUNCTION | |
|---|---|
| | Function 1 |
| A1. %age of dataset variance accounted for | 100.00% |
| A2. Canonical correlation | .59 |
| **A3. Mean Values per Category on Function Scale** | |
| | Function 1 |
| Romance/Germanic only | -.36 |
| non-Romance/Germanic experience | 1.45 |
| **B. MAKEUP OF FUNCTION** | |
| **B1. Suggested Name** | |
| | Function 1 |
| | - |
| **B2. Key-Variable:Function Coefficient Matrix** | |
| | Function 1 |
| *Solo/Mixed Language Count* | .95 |
| *Class-Only Exotic Experience* | .54 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | |
| | Function 1 |
| *Solo/Mixed Language Count* | .85 |
| *Total Language Count* | .81 |

## Appendix A5.xi

## Solo/Mixed Initial Learning-Means Profile: Discriminant Analysis Table;

## Independent Variables: Learner-Profile

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 74.54 | 25.46 |
| A2. Canonical correlation | .73 | .53 |
| A3. Mean Values per Category on Function Scale | | |
| | Function 1 | Function 2 |
| all languages classwork/parallel | -.73 | .45 |
| all languages self-instruction-only | -.36 | -1.01 |
| languages vary | 1.74 | .15 |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | - | - |
| B2. Key-Variable:Function Coefficient Matrix | | |
| | Function 1 | Function 2 |
| Solo/Mixed Language Count | 1.00 | -.24 |
| Solo/Mixed Maximum Command | .01 | 1.03 |
| B3. Independent-Variable:Function Correlation Matrix (correlations $\geq$.40 only) | | |
| | Function 1 | Function 2 |
| Solo/Mixed Language Count | 1.00 | - |
| Total Language Count | .51 | - |
| Solo/Mixed Exotic Experience | .41 | - |
| Solo/Mixed Maximum Command | - | .97 |

## Appendix A5.xii

*Solo/Mixed Failure Profile*: Discriminant Analysis Table;

Independent Variables: Learner-Profile

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 68.16% | 31.84% |
| A2. Canonical correlation | .49 | .36 |
| A3. Mean Values per Category on Function Scale | | |
| | Function 1 | Function 2 |
| all languages failed | -1.12 | - |
| languages vary and/or so-so | -.51 | - |
| all languages successful | .39 | - |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | - | - |
| B2. Key-Variable:Function Coefficient Matrix | | |
| | Function 1 | Function 2 |
| *Solo/Mixed Maximum Command* | 1.05 | - |
| *Solo/Mixed Language Count* | -.42 | - |
| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| *Solo/Mixed Maximum Command* | .92 | - |
| *Solo/Mixed Initial Learning-Means Profile* | -.42 | - |

Appendix A5.xiii

*Solo/Mixed Maximum Command*: Discriminant Analysis Table;

Independent Variables: Learner-Profile

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 96.32% | 3.68% |
| A2. Canonical correlation | .71 | .19 |
| A3. Mean Values per Category on Function Scale | | |
| | Function 1 | Function 2 |
| advanced | -1.00 | - |
| intermediate | -.11 | - |
| beginners | 1.71 | - |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | - | - |
| B2. Key-Variable:Function Coefficient Matrix | | |
| | Function 1 | Function 2 |
| Total Language Count | -.79 | - |
| Solo/Mixed Initial Learning-Means Profile | .78 | - |
| Solo/Mixed Failure Profile | .52 | - |
| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| Solo/Mixed Failure Profile | .56 | - |
| Solo/Mixed Initial Learning-Means Profile | .53 | - |
| Class-Only Exotic Experience | -.44 | - |
| Class-Only Language Count | -.40 | - |

Appendix A5.xiv

*Solo/Mixed Dropout Profile*: Discriminant Analysis Table;

Independent Variables: Learner-Profile

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 87.29% | 12.71% |
| A2. Canonical correlation | .67 | .32 |
| A3. Mean Values per Category on Function Scale | | |
| | Function 1 | Function 2 |
| all languages continuing | -.70 | - |
| all languages stopped | -.25 | - |
| languages vary | 1.35 | - |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | - | - |
| B2. Key-Variable:Function Coefficient Matrix | | |
| | Function 1 | Function 2 |
| *Solo/Mixed Language Count* | .94 | - |
| *Solo/Mixed Initial Learning-Means Profile* | .26 | - |
| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| *Solo/Mixed Language Count* | .97 | - |
| *Total Language Count* | .56 | - |
| *Solo/Mixed Exotic Experience* | .48 | - |

Appendix A5.xv

*Initial Learning Means*: Discriminant Analysis Table;

Independent Variables: Individual-Language

(excluding *Final Learning Means* and *Overall Learning Means*)

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 99.42% | 0.58% |
| A2. Canonical correlation | .57 | .05 |
| A3. Mean Values per Category on Function Scale | | |
| | Function 1 | Function 2 |
| self-instruction-only | -.77 | - |
| parallel | .20 | - |
| classwork-only | .65 | - |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | - | - |
| B2. Key-Variable:Function Coefficient Matrix | | |
| | Function 1 | Function 2 |
| Command | .83 | - |
| Dropout | -.44 | - |
| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| Command | .90 | - |
| Dropout | -.57 | - |

Appendix A5.xvi

*Overall Learning Means*: Discriminant Analysis Table;

Independent Variables: Individual-Language

(excluding *Initial Learning Means* and *Final Learning Means*)

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 99.91% | 0.09% |
| A2. Canonical correlation | .65 | .03 |
| **A3. Mean Values per Category on Function Scale** | | |
| | Function 1 | Function 2 |
| self-instruction-only throughout | -1.14 | - |
| phases vary | .53 | - |
| parallel +/- classwork-only throughout | .74 | - |
| **B. MAKEUP OF FUNCTIONS** | | |
| **B1. Suggested Names** | | |
| | Function 1 | Function 2 |
| | - | - |
| **B2. Key-Variable:Function Coefficient Matrix** | | |
| | Function 1 | Function 2 |
| *Command* | .78 | - |
| *Dropout* | -.57 | - |
| **B3. Independent-Variable:Function Correlation Matrix (correlations $\geq$.40 only)** | | |
| | Function 1 | Function 2 |
| *Command* | .82 | - |
| *Dropout* | -.63 | - |

## Appendix A5.xvii

### *Dropout*: Discriminant Analysis Table;

### Independent Variables: Individual-Language

| A. DISCRIMINATORY POWER OF FUNCTION | |
|---|---|
| | Function 1 |
| A1. %age of dataset variance accounted for | 100.00% |
| A2. Canonical correlation | .51 |
| **A3. Mean Values per Category on Function Scale** | |
| | Function 1 |
| continuing | -.51 |
| abandoned | .68 |
| **B. MAKEUP OF FUNCTION** | |
| **B1. Suggested Name** | |
| | Function 1 |
| | - |
| **B2. Key-Variable:Function Coefficient Matrix** | |
| | Function 1 |
| *Overall Learning Means* | .67 |
| *Country Experience* | .60 |
| *Command* | -.59 |
| **B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only)** | |
| | Function 1 |
| *Overall Learning Means* | .81 |
| *Initial Learning Means* | .61 |
| *Command* | -.58 |
| *Final Learning Means* | .46 |

Appendix A5.xviii

*Command*: Discriminant Analysis Table;

Independent Variables: Individual-Language

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 98.32% | 1.68% |
| A2. Canonical correlation | .72 | .14 |
| A3. Mean Values per Category on Function Scale | | |
| | Function 1 | Function 2 |
| advanced | -1.40 | - |
| intermediate | -.42 | - |
| beginner | 1.15 | - |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | - | - |
| B2. Key-Variable:Function Coefficient Matrix | | |
| | Function 1 | Function 2 |
| Country Experience | -.63 | - |
| Initial Learning Means | .48 | - |
| Failure | .46 | - |
| Overall Learning Means | .39 | - |
| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| Initial Learning Means | .61 | - |
| Overall Learning Means | .60 | - |
| Country Experience | -.46 | - |

## Appendix A5.xix

*Country Experience*: Discriminant Analysis;

Independent Variables: Individual-Language

(*n* = 122: excluding 2 missing tokens)

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 76.59% | 23.41% |
| A2. Canonical correlation | .51 | .31 |
| A3. Mean Values per Category on Function Scale | | |
| | Function 1 | Function 2 |
| none | -1.00 | - |
| holidays | -.05 | - |
| residence | .68 | - |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | - | - |
| B2. Key-Variable:Function Coefficient Matrix | | |
| | Function 1 | Function 2 |
| Command | 1.05 | - |
| Dropout | .66 | - |
| Exoticism | -.09 | - |
| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| Command | .80 | - |

## Appendix A5.xx

*Initial Learning Means*: Discriminant Analysis;

Independent Variables: Individual-Language

(excluding *Final Learning Means* and *Overall Learning Means*;

n = 79: excluding Language Name = French)

| A. DISCRIMINATORY POWER OF FUNCTIONS | | |
|---|---|---|
| | Function 1 | Function 2 |
| A1. %age of dataset variance accounted for | 99.40% | 0.60% |
| A2. Canonical correlation | .58 | .05 |
| A3. Mean Values per Category on Function Scale | | |
| | Function 1 | Function 2 |
| self-instruction-only | -.47 | - |
| parallel | .05 | - |
| classwork-only | 1.14 | - |
| B. MAKEUP OF FUNCTIONS | | |
| B1. Suggested Names | | |
| | Function 1 | Function 2 |
| | - | - |
| B2. Key-Variable:Function Coefficient Matrix | | |
| | Function 1 | Function 2 |
| Command | .75 | - |
| Dropout | -.57 | - |
| B3. Independent-Variable:Function Correlation Matrix (correlations ≥.40 only) | | |
| | Function 1 | Function 2 |
| Command | .82 | - |
| Dropout | -.66 | - |