Exploring Learners’ Self-Reported Behavioral Patterns in Two Task-Readiness Conditions: A Qualitative Study

Gavin BUI
Hang Seng Management College
(Mark) Feng TENG
Hong Kong Baptist University

Abstract

Task-planning studies have mostly been conducted using quantitative methods, not qualitative. However, the actual planning behaviors by learners could be overlooked by quantitative research which focuses mostly on planning outcomes rather than the processes. This study aims to bridge this gap by exploring learner behavioral patterns in pre-task planning as well as the under-investigated area of topic familiarity by drawing upon interview data. This consists of a comparison between the task-external and task-internal readiness constructs proposed in Bui’s (2014) task-readiness framework. Eight undergraduate students in Hong Kong completed two speaking tasks (a familiar and an unfamiliar task), followed by retrospective interviews. Though largely confirming previous (but parsimonious) research on task planning behaviors, this study discovered three major findings that had not been covered well in previous literature. First, while past studies focused on the psycholinguistic processes of task planning, these participants extensively reported its affective influences. Next, most participants reported their overall intended emphasis was on accuracy. These reports contradict general quantitative research results which suggest that task planning often leads to complexity, not accuracy. Finally, the lack of planning time as task-external readiness can be partly compensated for by topic familiarity as task-internal readiness. These issues along with their relevant implications in teaching and learning are discussed in this study.

Keywords: strategic planning; topic familiarity; task-readiness; fluency; accuracy; complexity
1. Introduction

Over the past two decades, there has been a growing interest in planning in language learning tasks, whether it is pre-task planning, during-task planning, or rehearsal (Ellis, 2005). A growing body of research supports findings that learners who are afforded with opportunities to plan prior to a task are more likely to produce discourses of higher quality, e.g., better performance in fluency and linguistic complexity (e.g., Bui & Huang, 2018; Foster & Skehan, 1996). Following early research on planning by Ellis (1987) and Crookes (1989), many studies on different types of planning emerged (Ellis, 2009). With very few exceptions such as Ortega (2005) and Pang and Skehan (2014) reviewed below, almost all studies were conducted following the quantitative research paradigm. Their data collection and analyses were mostly based on quantitative methods in planning research. Theoretical frameworks for planning and the subsequent performance, such as the Cognition Hypothesis (Robinson, 2011) and the Limited Attention Capacity Hypothesis (Skehan, 2014), were basically all drawn from and tested against quantitative data. Fruitful as the research outcomes may be, the age-old debate about the advantages and disadvantages of quantitative research seems to still apply here — the bulk of group-based quantitative studies appear to inevitably miss quite a lot of essential understanding on what happens during pre-task planning. As Pang and Skehan (2014) commented, researchers “seem to have been keener to try to infer the mental processes of participants from quantitative patterns, rather than to discover what the participants themselves have to say” (p. 112). Such in-depth exploration could be obtained through qualitative methods. This research, capitalizing on a relatively new theoretical framework of task-readiness (Bui, 2014), attempts to examine learners’ reported behavior through retrospective interviews. Such investigation through qualitative data should not only shed light on the psycholinguistic processes but also wider perspectives like the affective aspects at the level of detail that might have been previously overlooked in the literature.

2. Literature Review

2.1 From task planning to task-readiness

Strategic planning is the most widely researched construct amongst all forms of planning. It entails learners “preparing to perform the task by considering the content they will need to encode and how to express this content” (Ellis, 2005, p. 3). In other words, it differs from rehearsal as it focuses on the message to convey and the general outline of such a message. It does not usually involve rote repetition of a task as rehearsal does. Strategic planning is generally operationalized as giving planning time prior to a task. Research has shown facilitative effects of different types of planning. However, as argued by Bui (2014), the scope of planning is somehow limited as to what provides learners “preparedness” in relation to task completion. He proposed a theoretical framework of task-readiness as an extension to the notion of planning, which includes both task-internal and task-external...
readiness. This framework predicts that the conventional performance areas of complexity, accuracy and fluency (or CAF, see Bui & Skehan’s (2018) most recent review) show distinctive variations under different types of task-internal readiness.

All three forms of planning proposed by Ellis (2009), namely rehearsal, pre-task planning, and online planning, are reconceptualized as explicit planning in Bui’s (2014) task-readiness framework (Figure 1). Bui (2014) tries to make an extension to the concept of planning with the new inclusion of the task-internal dimension, which includes topic familiarity, schematic familiarity, task type familiarity and task repetition. By using the terms “internal/external,” Bui contrasts the levels of external manipulation imposed on students and pinpoints task-internal readiness as what learners themselves inherently bring to the task — albeit not necessarily consciously — as a resource at their immediate disposal. The notion of task-external readiness, however, depicts the extra preparation opportunities offered to learners, mostly in an instructional context. It appears that the newly proposed task-internal readiness dimension potentially helps create a more natural communicative condition similar to real world settings. Bui’s proposal of task-readiness as an extension to planning makes “interesting developments accompanied by research exploring these evolving ideas of how learners can be prepared to perform a task” (Ellis, in press). However, such developments, especially the task-internal dimensions, have been relatively unexplored in the literature.

<table>
<thead>
<tr>
<th>Macro-dimension</th>
<th>Micro-dimension</th>
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<tbody>
<tr>
<td>Task-readiness</td>
<td>Topic familiarity (prior subject knowledge)</td>
</tr>
<tr>
<td>Task-internal readiness (implicit planning)</td>
<td>Schematic familiarity (structural or procedural knowledge)</td>
</tr>
<tr>
<td>Task-external readiness (explicit planning)</td>
<td>Task familiarity (task types)</td>
</tr>
<tr>
<td>Task-internal readiness (implicit planning)</td>
<td>Task repetition (content repetition without the awareness of future performance)</td>
</tr>
<tr>
<td>Task-external readiness (explicit planning)</td>
<td>Rehearsal (repetition with the awareness of future performance)</td>
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<td></td>
<td>Strategic planning (pre-task preparation)</td>
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<td></td>
<td>Within-task planning (online preparation)</td>
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</table>

**Figure 1.** A Framework of task-readiness. Source: Bui (2014, p. 66)

### 2.2 Levelt’s speaking model and its adaptation

Levelt’s (1989) “blueprint of speaking” is an influential theoretical model of speech production to explain oral task performance under various task-readiness conditions.
There are three stages involved in the speech-making processes. During the first stage, Conceptualization, one selects the objective, content, and language to use, with a pre-verbal message ready for the next stage. At the second stage, Formulation, the speaker retrieves relevant lexis and grammar to assemble sentences appropriate for expressing the message, and ends with a phonological plan to be delivered. The last stage, Articulation, provides a motor program for the phonological plan to be executed and articulated. Levelt (1999) slightly revised the model to involve two general systems: the rhetorical/semantic/syntactic system (including conceptualization and grammatical encoding) and the phonological/phonetic system (including morpho-phonological encoding, phonetic encoding and articulation). The former system provides a surface structure for the latter to formulate a phonological plan and execute the plan into overt speech. De Bot’s (1992) adaptation of this model for bilingual speakers and Segalowitz’s (2010) adaptation for L2 fluency identified areas of vulnerability for L2 speaking during the speech processes. Both argued that Formulation is the most problematic process for L2 learners as lexical, grammatical, and phonological encoding requires parallel processing capacity that one lacks in an L2. L2 learners, therefore, could become overwhelmed during Formulation. Kormos (2006) extended this model to L2 speech production and stressed the demand for lexical as well syntactic formulation, which poses great challenges for L2 learners.

2.3 Effects of task-readiness on CAF

Since Ellis (1987) and Crookes (1989), much research concerning the effects of task-external readiness conditions such as pre-task planning and during-task planning on CAF, has emerged and flourished. One general area with consistent findings is the positive influence of pre-task planning on the temporal aspects of L2 fluency, which include a higher production rate (Tavakoli & Skehan, 2005) and mean length of run (Bui & Huang, 2018), with a reduced number of mid-clause pauses (Bui, 2014). However, the effects of planning prior to a task on repair fluency (e.g., false starts and reformulation) are less clear. While sometimes pre-task planning has been found to reduce the number of repairs (Foster & Skehan, 1996), Bui (2014) in fact discovered that planning time leads to more replacements. Pre-task planning has also been shown to exert a favorable impact on complexity (Skehan, 2014), such as a higher ratio of subordination (Tavakoli & Skehan, 2005) and a longer unit of production such as a T-unit or an AS-unit (Wang, 2014). In contrast, the planning literature has presented mixed findings regarding accuracy. Yuan and Ellis (2003) argued that it is difficult to affect accuracy through pre-task planning unless it is jointly influenced by during-task planning.

With the exception of Bui (2014), very few studies have systematically investigated the effects of task-internal readiness on CAF. Bui (2014) discovered that topic familiarity helps to enhance most breakdown fluency measures such as speech rate and mid-clause pauses, and one repair fluency measure: verbatim repetition. Topic familiarity also increases accuracy and lexical complexity but not syntactic complexity. Skehan and Foster (1999) found that schematic familiarity with a story structure has strong effects on better L2 fluency and even accuracy. Task repetition by unwitting L2 learners as task-internal
readiness (as contrasted with task-external rehearsal) has proven to be quite an effective means of boosting fluency and complexity (Bygate, 2001) or even all three areas of CAF (Wang, 2014).

Fruitful as it may seem, the task-readiness and CAF literature have almost been exclusively based on quantitative research. Little is known about how L2 learners actually orient their limited attention capacity (Skehan, 2014) to complexity, accuracy or fluency. It is therefore important to gain insight into what learners’ preferences are during their preparation for subsequent performance and how they arrive at these decisions. Such in-depth understanding could be obtained through a nuanced exploration into learner retrospection after he or she completes a task circle, as will be shown in this research.

2.4 Empirical qualitative studies on planning behaviors

To the knowledge of the authors, there were few empirical qualitative studies probing into learner behavioral patterns of pre-task planning. The three studies discussed below are the very few exceptions that could illuminate the current research with their methodology and findings. An early study by Ortega (2005) explored pre-task planning through retrospective interviews in which she asked participants what they had done during the planning time. The results were classified with respect to the three major categories of learner strategies: metacognitive strategies, cognitive strategies, and social strategies, as put forward by O’Malley and Chamot (1990) and Oxford (1990). Ortega (2005) reported that the participants relied heavily on retrieval and rehearsal strategies. Retrieval operations, in this context, refer to better access to and organization of thoughts or ideas, lexis, and grammar. Rehearsal operations occur when learners make use of the planning time to practice a task in mind through using pre-imagined ideas, thoughts, words, and sentences. Her participants believed that these two broad strategies helped to boost L2 speaking performance. This study also found that the advanced group used both approaches relatively evenly whereas the low-intermediate group relied more on retrieval strategies. A range of monitoring strategies were also reported though lower proficiency learners showed less effective use of them. Two general considerations were observed here. First, the participants monitored their oral production for grammar, which will be further explored in the current study. Second, these learners monitored their speech due to the sense of audience. For example, participants would think about how to make the content more accessible, how they could retrieve simpler vocabulary, and how they could avoid more advanced grammar so that their interlocutors could achieve better comprehension.

More recently, Pang and Skehan (2014) partially replicated Ortega’s study with a low-proficiency group and a high intermediate group of L2 English learners. Unlike Ortega (2005) which focused on learner strategies, Pang and Skehan employed a coding scheme consistent with Levelt’s (1989) speech production processes we have delineated in the last section. The two groups in their study showed largely similar behaviors during their planning time. The most frequently reported types of planning included: planning small details, retrieving lexical items, and taking listeners into consideration. However, the findings showed a slight preference by the high-intermediate group to think of ideas
beyond the picture, connect the pictures to develop the story and retrieve more connective words. Adding to Ortega’s (2005) general conclusion that high proficiency learners used planning strategies in a more balanced manner, Pang and Skehan (2014) more specifically demonstrated that the more advanced learners tended to invest more cognitive resources in the “conceptualization” stage, while the participants with low proficiency had to spend more effort on the “formulation” stage, conducting more lexical and grammatical planning than thinking of new ideas. Ahmadian and Tavakoli (2014) found that learners would monitor the lexical choice and speech content if there was an opportunity to plan; they consciously engaged in directing their attention resources to different aspects of oral production. This shows that learners may play a more active role in pre-task planning processes than previously assumed.

2.5 Gaps in previous literature

It seems that the previous relevant literature, especially the few qualitative studies, largely focused on the task-external pre-task planning with an occasional discussion on the effects of proficiency. However, the task-internal dimensions in Bui’s (2014) terms (see also Bui & Huang, 2018), namely familiarity with content, structure or task types, have not been touched upon in any qualitative studies. Second, previous qualitative studies employed established theoretical frameworks in learner strategies (Ortega, 2005) or psycholinguistic models such as Levelt’s (1989) speaking “blueprint” (Pang & Skehan, 2014). Though these approaches may seem reasonable as they enable data to be organized in a structured manner, they might run the risk of overlooking issues beyond learning strategies and the Leveltian stages, such as affective factors and individual preferences for complexity, accuracy, and fluency. Therefore, this qualitative study will explore the self-reported learner behavioral patterns as influenced by both task-internal readiness (content familiarity) and task-external readiness (pre-task planning) with learners at two different proficiency levels. On top of the commonly employed theories such as learner strategies and the Levelt’s model, this research tries to adopt relatively new concepts in task-planning, which include affective factors and metacognition in data interpretation. It is important to note, though, that they are post hoc methods employed after the data have been analyzed rather than pre-determined hypotheses.

To address these issues, three research questions were proposed as follows:

(1) How do learners perceive pre-task strategic planning?
(2) How do learners perceive the relationship between pre-task strategic planning and fluency, accuracy, and complexity?
(3) How do learners perceive the relationship between the level of familiarity and task performance?
3. Methodology

3.1 Participants, materials, and procedure

Eight Hong Kong tertiary-level students who learn English as a second language (L2) participated in this study. One main reason for focusing on Hong Kong L2 learners was to avoid possible influences from diverse first languages (Carson, 1992). In addition, it was advantageous to have participants with the same first-language (L1) background, as data collection through interviews was conducted using the same L1 (Cantonese) for all participants. Although originally there were ten interviewees, eight learners who had provided in-depth data and who indicated topic familiarity as expected (see the participant survey below) were selected. Participants were enrolled at a university in Hong Kong, where English is used as a medium of instruction. They all signed consent forms and could withdraw from the study at any point.

The participants were interviewed immediately after completing both a familiar and an unfamiliar task (see 3.2 below). Four of them were given 10-minute pre-task planning during which they were provided with a piece of paper and a pen, which were collected when they began to speak. No specific instructions about how to plan were provided. The other four participants had no planning opportunity and were asked to make an impromptu speech after the topics were announced. The participants completed a survey about their background information, including familiarity with the topics (e.g., computer majors who indicated higher familiarity with the natural virus topic were excluded from the study), previous L2 studies and the A-Level “Use of English” exam results, experience with learning through tasks, and planning strategies for English. In addition, each participant was given a C-test borrowed from Dörnyei and Katona (1992). The participants were estimated to be at a high or intermediate proficiency level based on the combined results of the C-test and the self-reported A-Level English exam. Detailed information about the participants is shown in Table 1.

Table 1. Detailed information about the participants.

<table>
<thead>
<tr>
<th>Participants</th>
<th>Age</th>
<th>Sex</th>
<th>Major</th>
<th>Proficiency</th>
<th>Years of L2 learning</th>
<th>Planning</th>
<th>Order of tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>20</td>
<td>F</td>
<td>Med yr 2</td>
<td>Intermediate</td>
<td>14</td>
<td>No planning</td>
<td>F then UF (Familiar then unfamiliar tasks)</td>
</tr>
<tr>
<td>B</td>
<td>20</td>
<td>F</td>
<td>Comp yr 3</td>
<td>High</td>
<td>14</td>
<td>No planning</td>
<td>F then UF</td>
</tr>
<tr>
<td>C</td>
<td>19</td>
<td>F</td>
<td>Comp yr 1</td>
<td>Intermediate</td>
<td>13</td>
<td>No planning</td>
<td>F then UF</td>
</tr>
<tr>
<td>D</td>
<td>18</td>
<td>M</td>
<td>Comp yr 1</td>
<td>High</td>
<td>12</td>
<td>No planning</td>
<td>UF then F</td>
</tr>
<tr>
<td>E</td>
<td>18</td>
<td>F</td>
<td>Med yr 1</td>
<td>High</td>
<td>12</td>
<td>Planned</td>
<td>F then UF</td>
</tr>
<tr>
<td>F</td>
<td>18</td>
<td>F</td>
<td>Med yr 1</td>
<td>Intermediate</td>
<td>12</td>
<td>Planned</td>
<td>F then UF</td>
</tr>
<tr>
<td>G</td>
<td>19</td>
<td>M</td>
<td>Med yr 2</td>
<td>High</td>
<td>13</td>
<td>planned</td>
<td>F then UF</td>
</tr>
<tr>
<td>H</td>
<td>19</td>
<td>F</td>
<td>Comp yr 1</td>
<td>High</td>
<td>13</td>
<td>planned</td>
<td>UF then F</td>
</tr>
</tbody>
</table>
3.2 Data collection and analysis

Before starting the task, participants were provided with the following general scenario: Suppose you were a specialist in the field, giving a presentation to a group of college students who had neither medical nor computer science training but were quite interested in these topics. Each participant was to do both the following topics.

Topic 1: Please describe detailed information about the general process that occurs when a human body is being infected by a virus, its related possible consequences, and a general method for dealing with a virus-infected patient.

Topic 2: Please describe in detail the process that occurs when a computer has been infected by a virus, its related possible consequences, and a general method for dealing with a virus-infected computer.

After the completion of these tasks, in-depth interviews were conducted. The interviews focused on their cognitive processes, experiences, and ideas in relation to their task-based learning along with their pre-task strategic planning patterns in terms of word use, grammar, ideas, and story/speech structure. The interviews were immediate retrospective accounts that tapped into participants’ memories of their prior task performance. To practice conducting semi-structured interviews, an interview protocol was developed although it was modified at appropriate times during interview sessions (Creswell, 2007). For example, to stimulate participants’ recall and probe deeper into their feelings, when asking follow-up questions, the visual stimuli and observations made during the pre-task planning session were drawn upon, and posing directive questions was avoided. Prompts for interviews are presented in the Appendix. A total of eight retrospective, semi-structured interviews were conducted and audio-recorded, each lasting 30-50 minutes. Cantonese, the native language of the participants, was employed for the interviews in consideration of comfort and convenience.

Data analysis was conducted using the following procedures. First, the data were examined through thematic analysis, as it is helpful for identifying, analyzing, and reporting themes and interprets various aspects of the research topic (Braun & Clarke, 2006). The authors persistently assessed the interview data in depth by rereading the original transcripts, and then deconstructed, constructed, and reconstructed the meanings in the data with particular attention to possible emergent themes. Researcher triangulation was achieved through rigorous discussions by the two researchers. This is regarded as an effective means to facilitate data interpretation in qualitative studies (Clandinin & Connelly, 2000). Second, after carefully examining the transcripts, the interview data were independently reread. To ensure trustworthiness of the data and the themes, mutual discussions were held regarding disagreements, and the participants were invited to check the transcripts and the coding. Agreement was finally reached in the identification of emergent categories, which include (a) Perceptions towards strategic planning behaviors; (b) Fluency, accuracy, and complexity in strategic planning; (c) Task-readiness: Task-internal topic familiarity versus Task-external strategic planning.
4. Results

The present study essentially confirms the general planning patterns outlined in previous studies (Ortega, 2005; Pang & Skehan, 2014). The participants reported that the planning time was exploited to gather information, retrieve relevant lexical items, organize them into an outline of a message, decide on the appropriateness of expression, and think about ways of avoiding grammatical problems. Some even claimed to have used the time for rehearsing part of their speech for the upcoming speaking tasks. Additionally, data collected from the students also reveals four relatively new findings: 1) affective factors related to pre-task planning, an issue previously overlooked due to the focus on psycholinguistic influences; 2) planners’ intended focus on accuracy, which is quite contrary to the general quantitative research results that planning leads to complexity and often not accuracy; 3) the lack of planning time can be partially compensated by topic familiarity; and 4) some advanced learners feel it unnecessary to plan, which is another area that has not been fully explored in literature (Pang & Skehan, 2014, briefly mentioned this though).

4.1 Perceptions towards strategic planning behaviors

In general, planners gather ideas, look for proper wording and try to prefabricate some sentences during the ten-minute period prior to speaking. For example, “I thought of what I had learned about computing and information security and how these can fit into the computer virus topic” (Participant B). “I used the ten minutes to figure out some words and take some notes, and if I could not think of an appropriate word, I would rack my brain to try another way,” reported Participant E. “I tried to produce some good and complex sentences in my mind and modify some of the errors that I might have made,” reported Participant F. It appears that pre-task planning gives learners an opportunity for macro- (e.g., B) and micro-planning (e.g., E & F), with planning strategies ranging from general idea-making to detailed word selection. Some students tried to rehearse a speech before the actual task. Participant F commented, “I mentally practiced my speaking during planning,” which was echoed by Participant G, who stated, “I made a lot of practice during planning in my mind.” These findings were largely in line with existing research on planning behaviors. Interestingly, a few students, such as Participant G, though attempting to practice a speech in advance, had difficulty in transferring mental preconception into the actual talk. He stated,

When I spoke, I had forgotten some key words and sentences. I had thought of a lot of words, but I only used a few of them in my speaking.

An important point that has not been fully explored in previous literature was the affective aspects of pre-task planning. Both planners and non-planners in this study mentioned the emotional influence of planning and even the frustration due to the lack of it sometimes. For example, “I felt more comfortable after having the planning time”
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(Participant E), and “I struggled when I was asked to speak at a moment’s notice” and if given some time to prepare, “I could do much better” (Participant B). Participant A expressed, “I had always been terrified of public speaking, of having to present to my class at school or university.” Participant C regarded planning as a personal preference saying: “Different speaking occasions call for different delivery methods, and while it may be acceptable to speak from memory in some situations, I often relied on taking some notes.” Overall, planning time seems to release stress from some L2 speakers for their subsequent performance.

Though most participants showed a favorable attitude, a few students also touched upon their uncertainty about strategic planning. Participant H mentioned that focusing on linguistic accuracy and complexity lowered his speech rate. He reported,

I focused on the planning time, and I stuck to it. But when I presented my speech, it was totally different because I felt nervous. Thinking too much only made me slow down my speed in speaking.

Participant H also reported her uncertainty about the need for pre-task planning. She thought she could “do it without planning” because she was “quite confident in my [her] proficiency in performing such tasks.” Some participants felt it unnecessary to plan for a familiar topic or prior experience in presenting content like the current tasks. For example, participant D reported, “Using skills for managing speaking anxiety can help me better manage the challenges for speaking without planning and be a competent speaker because the prior expertise about the topic can compensate for the lack of organizing time.” The findings on topic familiarity will be further presented in Section 4.3.

4.2 Fluency, accuracy, and complexity in strategic planning

With the opportunity to plan, most learners felt that they spoke more fluently. Participant E confirmed that “the more time allowed in planning helped me to speak more fluently.” In a similar vein, Participants F and G appreciated the availability of preparation time so that they could “practice” or “prepare” the whole speech, which pushed them to “speak faster” (F) or “reduce the fillers like ‘err’ and ‘hmm’” (G). In contrast, learners without planning expressed difficulties with fluency. Participant A reported,

I fumbled. I had heaps of long pauses in expressing what I intended to say when I lacked time for preparation.

Participant B’s reflection suggested how the lack of planning time leads to conceptualization problems which may impact fluency. For example,

When I was required to say something on a topic without preparation, I encountered difficulty in giving a right shape of speech to my mental thoughts or ideas or information. It is also difficult for me to put the right words in a logical order to express myself clearly. (Participant B)
What appeared to be a bit surprising from the interviews was the overall concern about accuracy in planning. These concerns included lexical and syntactic accuracy and even discourse appropriateness.

During the ten minutes of planning time, I would focus on the correctness of some words…. The ten-minute planning is useful for me to pre-think some sentences and words in my mind. Due to this, I think I have produced more accurate sentences and words when performing tasks. (Participant F)

In addition to rehearsal, I also used planning to figure out whether the sentences that I thought of were grammatically correct (Participant G).

Besides the emphasis on these areas, Participant F reported, “I modified some of the errors that I might have made.” This seems to suggest a tendency to predict and monitor errors that could emerge during the actual task performance. Participant C also stated that the lack of preparation for a speaking task gave rise to a fear of errors. She stated,

When there is no preparation time for the speaking task, I would develop a fear of being ridiculed. I was afraid I would make mistakes.

The L2 learner anxiety for correct expression was further shown in non-planners. For example, “Without planning, the moment I started to speak, I would become nervous because I would make grammatical mistakes” (Participant A). This is further echoed by Participant B, “Although I am confident in my English proficiency, I need more time for practice to ensure better accuracy and fluency.”

Some participants did report that during planning they tried to think of more complex sentences. Take Participant D’s response as an example,

When being allowed to have time for preparation, I would pre-think some complex sentences in my mind. Without preparation, I would focus on some simplified words and sentences to express my intended thoughts.

However, such an intention seemed to be often overridden by the fear of inaccuracy and disfluency. Participant H, for example, explained,

With the time for planning, I did attempt to produce more elaborate sentences. However, it was still difficult for me to produce complex sentences, particularly because I wanted to make those sentences accurate and maintain a certain level of fluency.

Non-planners supported the focus on accuracy as an L2 learner. Participant C stated,

I usually do well for the prepared speaking. However, I feel it is very difficult to form a correct sentence while trying to express instantly or spontaneously.
4.3 Task-readiness: Task-internal topic familiarity versus task-external pre-task planning

As noted in Section 3.2, all learners completed a familiar and an unfamiliar task. Interview data revealed that in a familiar task, schematic or at least background knowledge emerged and facilitated learner speech, as commented by Participant D, “As I am familiar with this topic, I could try to use my knowledge to perform the task well.” This seems to help learners to organize categories of information, while identifying the relationships between them. This is evident in the following quotes: “Before conducting the task related to medical knowledge, my mind already formed some structure of preconceived ideas or information” (Participant A) and

I like the topic related to computer science. I know how to create a framework representing some knowledge in this area. (Participant B)

Participant C added,

I am familiar with the topic related to computer science. Having organized some knowledge in my mind helped me to speak more fluently. It also helped me to attend to accurate expressions.

In contrast to strategic planning, which is task-external readiness imposed by teachers (by offering extra preparation time), interview data revealed that topic familiarity did provide learners with some natural preparedness for familiar tasks even in the absence of planning time. With this task-internal readiness, learners seemed less pressured with online planning of the content and instead focused more on the form. Interview data revealed that topic familiarity helped learners to monitor and to search for key words or formulaic sentences appropriate to their speaking task. They also evaluated whether their existing knowledge was fit for the task. According to their responses, topic familiarity exerted important effects on L2 performance. Participant E reported, “I would always know how to search for some useful words that I needed to present in a task.” Participant F also added, “Due to the familiarity with the topic, I attempted to evaluate whether the speech that I made in the task matched with what I thought in pre-task planning.” Overall, familiarity with the topic of a task provided learners with a clearer schema, which enabled them to produce speech with greater fluency and higher accuracy (with better online monitoring).

However, familiarity seems to be less related to structural ability (e.g., syntactic complexity) when speaking. As found in Bui (2014), topic familiarity does not seem to help learners’ structural complexity in narrative discourse. Participant F reported: “When I attempt to speak more smoothly than usual, it will lead to grammar mistakes, more L1 interference in the pronunciation, and less complex vocabulary.” However, topic familiarity seems to be in line with the conceptualization and formulation stages of Levelt’s (1989) speaking model. Learners can be primed in the conceptualization stage with the
prior knowledge in their relevant knowledge domain. They made decisions related to the objective, content, and language use, as well as prepared a pre-verbal message for the next stage, formulation. Formulation helped them retrieve relevant lexis and grammar to assemble sentences appropriate for expressing the message. As revealed by the participant F, “Being familiar with the subject matter can compensate for the lack of organizing time.”

On the other hand, participants expressed fear in performing an unfamiliar task. As reported by Participant D, “I was tempted to overstate or mislead an audience about the extent of knowledge or expertise when I was asked to speak about something I am not familiar with.” Participant E added, “The less experience I have with a given task, the more difficult it is to create good patterns for effective communication.” Participant F also explained,

I would come across as a bumbling fool when I was asked to deliver a short speech on an unfamiliar topic. I would speak less fluently, use fewer correct expressions, and less complex words because I need to focus on the topic knowledge while I speak.

5. Discussion

First, with pre-task strategic planning at their disposal, learners perceived better retrieval of appropriate words along with monitoring their oral production for grammatical accuracy, planning the message, and organizing their ideas for presenting. These findings are in tune with Ortega’s (2005) description of retrieval and rehearsal operations, two main benefits from pre-task planning. According to Ahmadian and Tavakoli (2014), learners who are allotted planning time consciously and deliberately focus on allocating their limited attentional resources to different aspects of their oral production, especially in lexical choice and informational content. Learners perceive pre-task planning helpful for gaining access to their limited interlanguage systems, thus providing them with a wider linguistic repertoire to be available for their subsequent online planning (Crookes, 1989). Learners also feel that the opportunity to plan prior to a task has facilitative impacts on the conceptualization stage where they could do macro-planning (decide on the topic and conceive ideas) and micro-planning (general ideas are translated into preverbal messages through accessible concepts).

However, the findings also indicate that some learners displayed negative preconceptions towards pre-task planning. A latent force at play is learners’ language proficiency levels. For those with a relatively advanced language proficiency, pre-task planning was perceived as not that advantageous. This suggests that task research should not only pay attention to external task conditions, but also to learners’ individual differences, e.g., language proficiency (see Bui, Skehan, & Wang, 2018, for a thorough discussion on advanced proficiency in task research). Additionally, the notion of planning as task-external readiness needs to be reconsidered. What offers “preparedness” to a task should be extended beyond the task-external planning conditions outlined by Ellis (2009). The familiarity with the content, the types and structure of a task, and whether
repeating a task is allowed, are critical dimensions that should be incorporated into this broad sense of planning (Skehan, 2016). Furthermore, learners reported that due to their limited memory capability or personal tension towards performing speaking tasks, they encountered a limitation in benefits that extra time brought them in terms of retrieval. Learners seemed unconfident about transferring their planned knowledge to online (real-time) performance. They reported feeling insecure and often forgetting some of the lexical items during their actual performances, even though those words were well-planned beforehand. This provides evidence that learners’ individual difference, e.g., tensions displayed when performing tasks, is one of the factors that have the potential to moderate their preconceptions about pre-task planning (Teng, 2017). In other words, learners can become tense when held accountable for their on-line speaking performance. Further studies should include the affective aspects of task-readiness as they have not been fully explored in task literature.

Overall, the comments indicate that learners’ familiarity with topics and their English proficiency can affect their decision-making to use or not use the planning period as well as the ways that they use it. The qualitative analyses revealed that learners’ perceived planning as helpful while conducting retrievable operations and rehearsal operations (Ortega, 2005), self-planning and self-monitoring, and deliberate allocation of attentional linguistic resources to different aspects of their spoken production. However, they also expressed a lack of transfer from planning to performance, limited memory in attending previous mental ideas to actual practice in speaking, and personal tension in speaking performance.

Second, the interview data revealed that learners found planning time generally facilitative for CAF performance in L2 tasks. This applies to more fluent and probably more complex L2 production, which corroborates findings in the relevant areas in their actual speaking. The participants in the present study also perceived a close relationship between strategic planning and accuracy, which was not supported by their own accuracy performance (see Bui, 2014, for quantitative results by participants performing the same tasks). In previous quantitative studies, there was an inconsistency about the effects of strategic planning on accuracy (Ellis, 2003, 2009; Skehan, Bei, Li, & Wang, 2012). It seems that whether the task conditions allow time for or encourage careful on-line planning (i.e., formulation and monitoring of speech plans during performance) also make a difference in learners’ actual performance (Yuan & Ellis, 2003). Therefore, learners expressed a difficulty in achieving a certain level of balance between complexity, fluency, and accuracy. This may be explained by Skehan’s (2014) Limited Attention Capacity Hypothesis. According to this hypothesis, students generally suffer from a constraint in processing capacity, and there is a likely trade-off between performance areas, especially between complexity and accuracy. Therefore, it is not surprising that some learners in the present study expressed that they wanted to produce accurate sentences but also desired to make those sentences complex. However, when focusing on complexity, they expressed some communicative problems in expressing accurate speech. They feared that they would lose control over the fluency. This suggests that learners find it difficult to address all three aspects at the same time. This also suggests that an aspect of performance needs to
be identified as the focus of our task-based teaching, followed by a selection of a set of conditions and task characteristics that would help the learners to achieve the pre-set aims.

To sum up, some learners viewed strategic planning as a sustainable competitive advantage or a mental exercise which helped with accuracy and fluency, although in practice they might not always achieve these intended goals. However, some learners also expressed that strategic planning was not beneficial to their performance. Although most of the task literature does not find accuracy effects for planning (see Skehan, 2016 for an updated review), learners in this study expressed that they tried to be both syntactically and semantically accurate with their subsequent strategic planning. However, it is important to note that the learners expressed different levels of difficulties concerning fluency, accuracy, and complexity. These results are in tune with Skehan’s (2014) argument that learners generally have a limited processing capacity and may therefore experience problems attending to all areas of performance simultaneously.

Third, learners reported that familiarity with the topic seemed to influence their accuracy and fluency. Topic familiarity or schematic familiarity strikes a balance in learners’ awareness between form and meaning, which can indeed signal a need to integrate new information and previous linguistic knowledge in learners’ schemata (Teng & Huang, 2018). Learners perceived a need to use their schemata to organize their current knowledge and to create a framework for better organization of their speech. This is regarded as schematic familiarity, as attested by Skehan and Foster (1999). It constitutes an inherent and natural type of task-internal readiness proposed by Bui (2014), albeit perhaps not so much a conscious process. This demonstrates the importance of encouraging learners to integrate the knowledge available to them into their active language use (Bygate & Samuda, 2005). To a great extent, providing learners with familiar topics in tasks can help them organize new perceptions into their schemata more efficiently, and thus achieve the preferred pedagogical end, as some of the participants reported. However, some learners revealed that topic familiarity was not related to complexity in speech. L2 learners regarded a practice in creating complex sentences in a task as a challenge, and a schema derived from a familiar topic might not be enough to promote more advanced (or complex) sentences. This suggests that syntactic complexity displays resistance to influence from task-internal readiness, such as topic familiarity when performing tasks.

The data reveal that topic familiarity seems to induce a certain level of motivation for doing a task. As suggested by Ryan and Deci (2000), learners who are intrinsically motivated tend to be more willing to engage in a task and make a commitment to improving their skills and capabilities while performing the said task. This is an important issue about the natural motivational tendency, which drives learners’ interest and enjoyment of the task itself rather than any other external pressures for task completion. This is a critical element that requires more attention for cognitive, social, and physical development (Donahoe, 2004). To intrinsically motivate students, the tasks should be under their control and the topics should be those that interest them. Most importantly, performing a task should not be considered a kind of pressure by the learners, but instead provoke a certain level of self-efficacy and self-regulation for them to believe that the task is within their ability and they can be effective agents in reaching their desired goals (Teng,
In addition, learners perceived topic familiarity as an aid in search of key words or sentences for speaking presentations. Learners also reported that topic familiarity helped them to evaluate whether their existing knowledge is fit for the task. This combination of need, search, and evaluate falls in line with Laufer and Hulstijn’s (2001) Involvement Load Hypothesis. These three constructs induced by a task have a close relationship with learners’ behaviors. Empirical studies have found contradictory results regarding the three constructs (e.g., Teng & Zhang, 2015), which can prompt us to rethink the causes of the differences in an individual’s eagerness to comply with a task. One of the reasons may be related to the topic familiarity of the task. Learners may perceive having a certain level of existing knowledge about a given topic for a task as an effective means to recall target information at a later time (i.e., performing a task). They may perceive topic familiarity as a basis for their metacognitive judgments. In other words, they may regard it as a cue for the recall of facts, which may help them with information retrieval during the conceptualization stage. Regardless of successful retrieval occurrence, learners may try and retry believing that the likelihood of topic familiarity brings them confidence in locating a recognition judgment in order to search and evaluate the target knowledge in mind.

Finally, the interview findings, triangulated with the quantitative findings by Bui and Huang (2018), suggest a need for a task-readiness framework (Figure 1) that extends the notion of planning in Ellis (2005, 2009). Task-internal readiness, which subsumes topic familiarity, schema familiarity, task type familiarity and task repetition, is a kind of implicit or unconscious preparation that learners bring into a task. This readiness takes place before or during the task performance, often in the form of a natural interaction between a certain task and a learner. In this study, for example, a computer virus task matches the background of a computer science student. This match thus gives rise to implicit readiness for this learner, which is not the same as the readiness derived from extra planning time. On the other hand, task-external readiness in the forms of strategic planning, rehearsal, and during-task planning is an explicit means that pushes learners to get ready for subsequent tasks. Task-internal readiness and task-external readiness interact with each other, as shown in strategic planning and topic familiarity in this research, to influence learners’ performance in terms of complexity, accuracy, and fluency. The concept of task-readiness (Bui, 2014) is a development of the construct of planning as it differentiates between explicit planning (task-external readiness) and implicit planning (task-internal readiness). Reviewing Bui’s task-readiness framework, Ellis (in press) himself admits that it is “no longer useful to talk about ‘planning’ as what I had earlier considered under this heading needed to be viewed more broadly.” During pre-task planning, learners may sense a need to select the most efficient sequence of steps from many alternatives and determine, select, apply and evaluate solutions to given problems. With the implicit support from task-internal readiness, learners may conceive what should be accounted for performing a task in mind and identify, organize, prioritize, shift, memorize, and check what information they need to process. In addition, with task-internal readiness at their disposal, learners may anticipate future events, formulate a goal or an endpoint, process knowledge they have known, and desire to achieve pre-determined goals.

Some implications for teaching derived from the findings are as follows: First,
learners reported that strategic planning made them think that they produced a more fluent and accurate speech while embarking on more elaborative language. They also reported affective influence of planning. Therefore, it seems reasonable to provide learners with time—of various lengths depending on their proficiency level—to plan prior to an actual task performance. Teachers can take advantage of pre-task planning to help learners to deal with adverse situations, for example, when their proficiency levels are not high and the topics are not familiar. Second, learners reported that task familiarity helped them to reduce anxiety and enhanced their willingness and readiness for a speaking task. Therefore, it is fair to argue that providing learners with some familiar topics for a task is important as it can somehow enhance their confidence and help them make choices by exercising a higher degree of control, especially at the elementary level. This could be followed by increasing the unfamiliar elements in subsequent stages though. Finally, although pre-task planning has been reported to boost linguistic complexity in the quantitative literature, as Bui (2014) argued, complexity still seems to be a thorny linguistic issue for L2 learners. Namely, L2 learners lack the ability to use cognitively demanding language (e.g., complex syntax) as a tool to experiment with more advanced and more elaborate language, particularly when a task provides little contextual support (e.g., unfamiliar topic). In this respect, learners may need contextual support prior to implementing a task to facilitate awareness of complexity in sentence structure and lexicon.

6. Concluding remarks

This qualitative study provides insights into understanding L2 learners’ behavioral patterns during strategic planning with different degrees of topic familiarity. Overall, learners used strategic planning to retrieve appropriate words, monitor their oral production for grammatical accuracy, plan the message they were to present, and organize their ideas for speech. Yet, these students showed a limited processing capacity, and consequently, faced a likely trade-off between complexity and accuracy. Planning was reported to boost learners’ confidence for a task to some extent. In addition, learners’ perceived topic familiarity helped them to develop a self-motivational need, search for helpful keywords, and evaluate a task. Learners reported preference in accuracy over complexity in this study, which is suggestive of a gap between learner intention and their actual performance (complexity does get raised as reported in the task literature), which is worth considering in our task design for teaching and learning.

There are some limitations to the present study. First, findings collected from the eight learners cannot be generalized to other settings. However, it may help to provide an in-depth understanding of L2 learners’ behavioral patterns during pre-task planning. Second, data triangulation is needed. For example, asking learners to write a reflective journal would be another effective method for collecting qualitative data, particularly when some learners are less inclined to express their thoughts verbally. Finally, following Bui and Skehan’s (2018) suggestion, providing instructions for how planning time should be used, including how form can be focused on, may also be effective. Planning training may also be useful. Without such instruction, learners can use the planning period in ways
that do not enhance performance. This issue is also worth further exploration.

References


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Appendix

Sample questions for the interviews

1. Could you please share with me some experiences while attending to the two tasks?
2. What did you think about pre-task planning?
3. Which topic is more familiar to you? Why?
4. What did you think of your performance when the topic of that task was more familiar to you? Why?
5. What did you think of your performance when the topic of that task was less familiar to you? Why?
6. How did you perceive fluency, accuracy, and complexity during the process of executing the tasks?
7. Do you think it possible to achieve fluency, accuracy, and complexity simultaneously when 10 minutes are allotted for pre-task planning? Why?
8. Could you please share with me some critical reflections about this type of task performance?

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About the authors

Gavin BUI, PhD, is Associate Professor of English (Applied Linguistics) at the English Department, Hang Seng Management College, Hong Kong. His research interests lie in task-based language teaching and learning, L2 fluency and lexis, and L3 motivation. His recent publications include SSCI journal articles in *Language Teaching Research* (2018) and *Applied Linguistics Review* (2018), as well as a co-authored monograph titled *Motivational Dynamics in L2 and L3 Learning* (to appear) with Springer. Email: gavinbui@hsmc.edu.hk

(Mark) Feng TENG is a language teacher educator with extensive teaching experience in China. He is now studying for a PhD degree in Hong Kong Baptist University. His professional interests include metacognition and writing, EFL vocabulary development, and identity research. He has published widely in international flagship journals, including *Thinking Skills and Creativity*, *Applied Linguistics*, *TESOL Quarterly*, and *Applied Linguistics Review*. He is currently a guest editor of special issue for several international journals. Email: markteng@life.hkbu.edu.hk