

An assessment of the economic value of Urdd Gobaith Cymru 2023

A report to Urdd Gobaith Cymru
By Arad Research

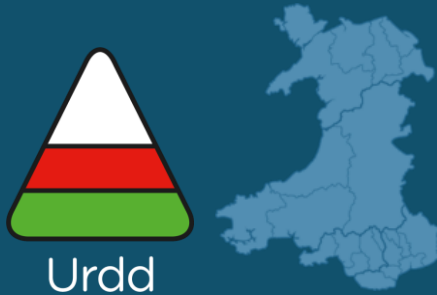
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Summary: economic impact of Urdd Gobaith Cymru

Economic value of the Urdd to Wales



- **Urdd Gobaith Cymru** generated an economic value of **£44.9m in Wales in 2022-23** (an increase of 76% since 2018) comprising:
 - A direct impact of **£15.4m** through the Urdd's expenditure on goods, services and staff in Wales
 - An indirect impact of **£10.6m** through expenditure by visitors to Urdd **eisteddfods, residential centres and sporting activities**
 - An induced impact of **£18.9m** through expenditure stimulated by the above (figures have been rounded)

- The Urdd received an income of **£19.6 million in 2022-23**
- **For every £1** of income received by the Urdd, the organisation generated an economic value of **£2.29 in Wales**
- **For every £1** of income received, the **Urdd Eisteddfod** generated a value of **£6.96**

Return on investment



Economic value of the Urdd's residential centres



- The Urdd's residential centres in Llangrannog, Glan-Ilyn and Cardiff provided accommodation for over **103,000 visitor nights** including for children, teachers and families as well as day visitors
- At a local level, the Urdd's residential centres generated a total economic value of **£7.9m** within their local areas, through their expenditure on goods, services and salaries as well as local expenditure by visitors:
 - **£3.2m in Ceredigion** through the **Llangrannog centre** (£7.8m in Wales)
 - **£3.2m in Gwynedd** through the **Glan-Ilyn centre** (£4.5m in Wales)
 - **£1.4m in Cardiff** through the **Cardiff centre** (£3.2m in Wales) (figures have been rounded)

- The Urdd's sporting activities generated **£6.1m** of economic value in Wales – through direct expenditure by the sports department and expenditure by 28,000 participants and attendees at clubs, competitions, family activities and events such as the Urban Games and rugby sevens

Value of the sports department



Economic value of the Urdd Eisteddfod



- The 2023 local and the national **Eisteddfods** generated an economic value of **£16.0m in Wales**
- The 2023 **Urdd national Eisteddfod** generated **£8.5m in the local area which hosted it** (Carmarthenshire)
- Eisteddfod visitors spent **£5.8 million on goods and services** from organisations based in the area which hosted it (Carmarthenshire).

- The Urdd offers apprenticeships within the Sport, Sport in Education, Childcare, Outdoor Activities and Youth Work sectors
- Currently, the Urdd works in partnership with **56 employers** to offer external apprenticeships and **149 learners** are working towards their apprenticeship
- Since 2016, **434 have started** an apprenticeship and **290 have completed** an apprenticeship
- **80%** of those who completed an apprenticeship within the Urdd's departments are in employment with the Urdd



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The Urdd's apprenticeship department



Community and youth work



- The Urdd's youth and community department spent £1.5m in 2022-23
- Evidence shows that youth work generates a return on investment of £3 for every £1 invested
- This suggests that the social value of expenditure by the Urdd's youth and community department could be £4.5m

Wider impacts of the Urdd

Data from a **survey of young people** shows that the vast majority of the sample who participated in Urdd activities during the summer of 2023 agreed they had progressed in a number of areas including:

A learner voice survey shows that Urdd apprentices had positive views on their progress and support they receive.

Social skills



Attitudes towards Welsh



Wellbeing & emotional skills



Learner Voice (apprentices)



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Social skills

- 89% felt 'more confident in social situations'
- 93% felt 'more confident to take part in activities with others'
- 87% felt 'more confident when communicating'

Attitudes towards the Welsh language

- 92% felt 'more positively about the Welsh language'
- 88% were 'more likely to use Welsh'
- 73% felt they 'understand more about Wales'

Wellbeing and emotional skills

- 80% said they were 'more willing to share my opinion'
- 83% agreed they 'better understand that my contribution is as valuable as that of others'
- 70% agreed they were 'more likely to ask for help when I need it'
- 88% agreed they 'know that I have a number of positive attributes'
- 89% felt 'prouder of myself'

Essential skills

- 87% felt their **communication, numeracy and digital literacy skills** were developing
- Welsh language**
- 98% noted they **often used Welsh on their course or in the workplace.**
- Support**
- 93% felt that **practitioners provided feedback that supported them well**
 - 95% of learners believed that the **Urdd used digital methods of communication well**
 - 100% felt that **staff had helped them settle into their course well**

1. Introduction and background

Urdd Gobaith Cymru commissioned Arad Research to complete an assessment of the organisation's economic value. The aim of the assessment was to assess the economic value of the Urdd nationally as well as the economic value of several of the organisation's individual departments including the Llangrannog, Glan-llyn and Cardiff residential centres, the sports department, the apprenticeship department, the Urdd Eisteddfod and the Urdd's youth and community department. The study also sought to assess how activities provided by these departments – particularly the youth and community department – have affected young people's skills, confidence and attitudes towards Wales and the Welsh language. This report sets out the findings of the assessment and follows on from a previous assessment of the Urdd's economic value carried out in 2018.

1.1 Urdd Gobaith Cymru

Urdd Gobaith Cymru is Wales' largest national voluntary youth organisation. The organisation was founded in 1922 to provide opportunities and experiences, through the medium of the Welsh language, for young people in Wales to develop into fully confident citizens. The organisation offers a wide range of provision for children and young people including:

- Residential centres in Gwynedd (Glan-llyn), Ceredigion (Llangrannog), Cardiff (Caerdydd) and Pembrokeshire (Pentre Ifan)
 - The Urdd has invested £2.5m of capital funding during 2022-23 to improve the centres, and re-opened the Pentre Ifan Environmental and Wellbeing Residential Centre in September 2023
- Sport: through weekly clubs, national and regional events and competitions
- Apprenticeships: offering provision for individuals and employers from all local authorities in Wales, including the essential skills hub
- Arts: by providing year-round activities, the Urdd National Eisteddfod and the TRIBAN festival
- Community and youth work: by offering weekly community provision, residential, school visits, half term events and accreditations
- International work: trips that provide young people with experiences and an opportunity to act as ambassadors for Wales and the Welsh language and learn from others
- Outdoor Activities: adventure experiences and outdoor challenges
- Magazines: IAW and CIP digital publications

Across the range of work set out above, the Urdd offers volunteering opportunities including supporting weekly clubs, working as a 'swog' (volunteer officer) in the residential centres and supporting overseas and day trips.

Structure and governance

The Urdd is a charity and company limited by guarantee. In 2022, the Urdd restructured its governance arrangements. It now has 6 Strategic Boards (with 61 members in total), which report to the Board of Trustees (17 members) to develop and scrutinise the work of the organisation, namely:

- Business Board
- Human Resources Board
- Sport and Apprenticeships Board
- Residential Centres Board
- Arts Board
- International Board

Since re-structuring the Urdd's governance, the organisation has included 18-25 year olds as full members on all Urdd Boards and young people are central to the Urdd's discussions and its future direction. Currently, 23 young people are Urdd board members, representing 38% of all board members. The Urdd's Strategic plan - [Urdd for All](#) - states that it is the organisation's intention to establish a Youth Work Board in the future.

Turnover and employment

The Urdd had a turnover of £19.6 million in 2022-23 and employed 362 staff in locations across Wales. This report considers the impact of the Urdd's spending on goods, services and staff salaries in Wales and examines the economic value of the organisation's departments nationally and at a local level.

The 362 staff employed by the Urdd include 217 full-time, 59 part-time and 86 casual workers. The Urdd offers a range of opportunities for young people, employing 153 full, part-time and casual staff who are under the age of 25; this equates to 42% of the Urdd workforce, which is a significant percentage. 23% of the organisation's staff are apprentices. The Urdd is one of the 500 Accredited Living Wage employers in Wales.

Changes since 2018

Since an assessment of the Urdd's economic value was last conducted in 2018, the organisation's activities have expanded in several ways. The most significant changes are that:

- the Urdd's economic value to Wales has increased from £25.5m in 2017-18 to £44.9m in 2022-23, an increase of 76%.
- the Urdd's turnover has increased from £10.2m in 2017-18 to £19.6m in 2022-23, an increase of 88%

- there has been an increase in the number of new apprenticeships each year from 35 in 2017/2018 to 73 in 2022/23, an increase of 109%
- there has been significant capital investment in the Llangrannog, Glan-Ilyn and Phentre Ifan residential centres.

The Urdd residential centres

As noted above, the Urdd now has four residential centres. This assessment considers the impact of the three camps that were operational during 2022-23, namely Llangrannog in Ceredigion, Glan-Ilyn in Gwynedd and the Cardiff centre. In 2022-23, the residential centres welcomed visitors for a total of 103,086 visitor nights:

- Llangrannog - 59,740
- Glan-Ilyn - 25,326
- Cardiff - 18,020

The assessment considers the impact of expenditure by these visitors in Gwynedd, Ceredigion and Cardiff as well as the residential centres' expenditure on goods, services and staff within their catchment areas.

Urdd sports department

The Urdd's sports department organises regular clubs, competitions, family sessions and other events across Wales. Urdd data for 2017-18 shows that 27,900 participants took part in activities organised by the sports department including:

- Urban games - 8000
- Rugby sevens - 5000
- Primary age sport - 3000 (2000 children + 1000 parents)
- Beach rugby - 2500 children
- Netball - 1400 girls
- Weekly clubs - 8000 children.

Urdd Eisteddfod

The Urdd Eisteddfod is one of the Urdd's key activities and represents a significant proportion of the organisation's income and expenditure. In 2023, 90,000 children and young people competed in the Urdd District, Regional and National Eisteddfods. A total of 270,000 children, young people and families experience the value of the Eisteddfod annually by engaging with it in some way. In addition, visitors who attended the national Urdd Eisteddfod in Carmarthenshire, brought significant economic benefit to the area.

This report considers the economic impact of the expenditure associated with hosting the Urdd Eisteddfod. This includes spending by the Urdd on goods, services and salaries for permanent and casual staff in Wales and Carmarthenshire. It also considers the economic benefits of expenditure by visitors to the Carmarthenshire area.

Apprenticeship department

In 2022/23, 73 young people enrolled on one of the apprenticeships provided by the Urdd in areas including care, sport, outdoor activities and youth work. The Urdd’s apprenticeship programmes have grown significantly since 2017/18.

Youth and community department

The Urdd, through its youth and community work, offers unique opportunities and experiences for young people across Wales including:

- Volunteering opportunities
- Residential experiences
- Courses and accreditations
- Community and school clubs
- Youth Forums
- International trips
- Youth Theatre.

1.2 Methodology

The analysis of the Urdd’s economic value is based on the following:

Direct impacts	<ul style="list-style-type: none"> • Direct expenditure by the Urdd on goods, services and staff salaries related to the activities of the organisation.
Indirect impacts	<ul style="list-style-type: none"> • Income and expenditure generated by expenditure by visitors to the residential centres, sports activities and local and national Urdd Eisteddfods.
Induced impacts	<ul style="list-style-type: none"> • Contributions to income and expenditure throughout the supply chain as a result of the Urdd’s core activities.

The method of estimating the economic value of the Urdd is based on the concept of a Keynesian Multiplier Effect. This effect takes into account that:

- expenditure by the Urdd (or the organisation’s individual departments) generates income for businesses and other individuals within the local or national economy.
- this income for businesses and individuals triggers rounds of further spending by these recipients, with some income withheld or spent outside the local economy in each round of spending.
- this process goes on until the local income generated reduces to a level that is negligible.

The total economic value to the local economy is the sum of these rounds of spending. The resulting economic value figures reflect the highest economic impact likely to result from the Urdd's contributions to the economy.

The findings are all based on the financial year 2022-23. The study has involved primary and secondary research, including:

- analysis of the Urdd's income and expenditure data, and the organisation's own data on visitor numbers to its residential centres, Eisteddfods, events, clubs and activities
- a survey of Urdd suppliers
- a survey of Urdd staff
- a survey of 2023 Urdd Eisteddfod visitors
- a survey of young people who took part in Urdd activities during the summer of 2023
- analysis of Urdd workforce data and apprenticeship numbers.

1.3 Data sources

Data on the Urdd's income and expenditure based on the year 2022-23 (excluding the Eisteddfod – see below) was received from the organisation and this was used to ascertain the **direct** impact in Wales as well as the local areas of the residential centres. The data received from the Urdd enabled us to identify how much of the organisation's expenditure was on suppliers and staff according to their location. This enabled us to identify the direct impact on Wales and the residential centres' local areas.

Although the 2023 Eisteddfod did not take place in the 2022-23 financial year, Urdd data on Eisteddfod expenditure and visitor numbers were used as part of the assessment. This was done to ensure that the assessment was as up-to-date as possible.

For the **indirect** impact, data from the Urdd Eisteddfod's 2023 visitor survey was used as well as estimates of expenditure by visitors and attendees of Urdd residential centres, sports activities and Eisteddfodau. Data was collected from 531 visitors to the Urdd Eisteddfod 2023 through an online survey. The survey included a series of questions that enabled us to estimate average visitor spending on the Eisteddfod site and in the local area. These included:

- Where visitors lived
- Number of days they visited the Eisteddfod site
- The number of nights visitors stayed locally, and the type of accommodation
- Spending on accommodation, goods and services locally
- Spending on goods and services on the Eisteddfod site.¹

For the **induced** impact, data from a survey of Urdd staff was used to estimate what proportion of the income they receive from the Urdd is spent in Wales and in their local area. A total of 88 out of 299 Urdd staff completed the questionnaire – a response rate of

¹ The method of selecting respondents (convenience sample) means that the sample of respondents cannot be considered as a random sample, and therefore cannot be generalised to the population of Urdd Eisteddfod visitors. Tests of statistical significance should be used for probability samples only. However, if the sample of respondents were a true random sample, then the sample achieved (531 visitors) would enable us to report the survey results with a 95% confidence level based on a 5% confidence interval for visitors. Statistically, this would enable us to state with 95% confidence that our sample's responses are within 5% of the 'true' percentage for the visitor population.

29%. Expenditure data was collected from 81 out of 481 Urdd suppliers based in Wales – a response rate of 17%.²

In terms of the **Urdd's wider impacts**, data on the numbers and profile of Urdd apprentices was reviewed, and survey data was collected from 103 young people who took part in Urdd activities during the summer of 2023. They were asked to indicate the extent to which they agreed with a series of statements in relation to their perceptions of the impact of the activities on:

- Their social skills
- Their Welsh language skills and attitudes towards the language
- Their wellbeing and emotional skills
- Their enjoyment of the activities.³

In addition, secondary data from a learner voice survey of 45 Urdd apprentices was used.

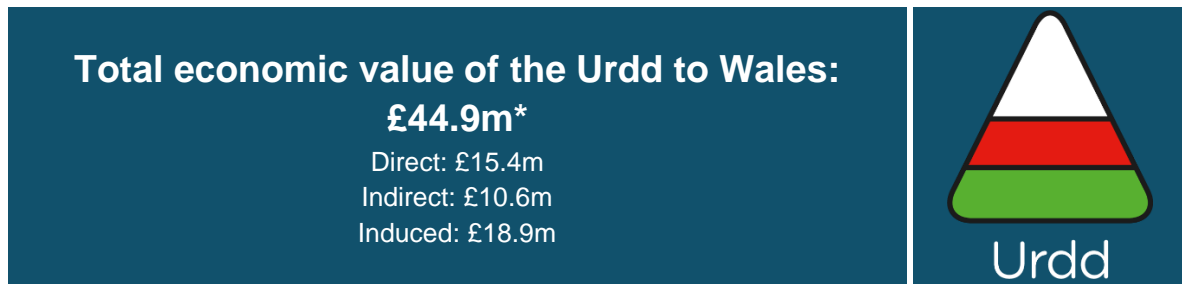
² A convenience sample was used rather than a random sample. If the samples of respondents were random samples, the sample sizes achieved (88 staff and 81 suppliers) would enable us to report the results of the surveys with a 95% confidence level based on a 9% confidence interval for staff and 10% for suppliers. See footnote 1 for further explanation.

³ A convenience sample was used rather than a random sample. If the sample of respondents were a random sample, then the sample size achieved (103) would enable us to report the survey results with a 95% confidence level based on a 10% confidence interval. See footnote 1 for further explanation.

2. Findings: economic value

The findings of the economic impact assessment are presented below, firstly for the Urdd as a whole organisation, followed by the findings for its individual departments. It is important to note that the figures below are rounded so the values specified for individual elements do not always match the total stated.

2.1 Economic value of the Urdd to Wales



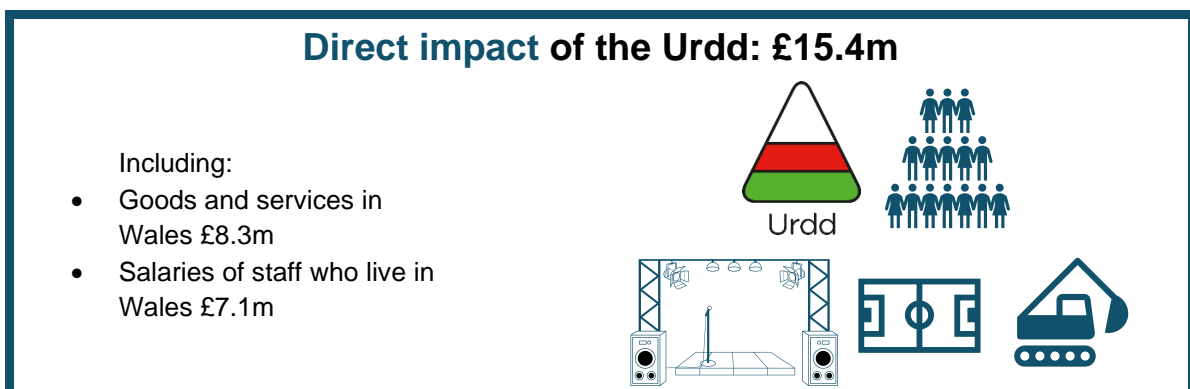
*Figures have been rounded and therefore the values specified for individual elements do not always correspond to the total stated

Direct impact of the Urdd in Wales

The Urdd's expenditure data shows that the organisation spent a total of:

- £11.0m on goods and services in 2022-23, with 75% of this (£8.3m) spent with suppliers based in Wales.
 - This included capital expenditure of £2.5m (97% of that on Welsh businesses) to improve facilities at the Urdd camps in Llangrannog, Pentre Ifan and Glan-Ilyn
- £7.1m on staff salaries, all of which live in Wales.

This means that the total **direct** impact of the Urdd on the Welsh economy in 2022-23 was £15.4m.





Indirect impact in Wales

In terms of the **indirect** impact, the Urdd's activities, including the local and national Eisteddfods, the residential centres, activities and sports competitions attract competitors, participants and visitors to areas across Wales. Their spending can be estimated using a survey from over 500 visitors to the 2023 Urdd Eisteddfod in Carmarthenshire alongside the Urdd's data on visitor numbers and their spending patterns. The analysis shows the following:

- Visitors to the **residential centres** spent an estimated £1.3 million on goods and services in the Ceredigion, Gwynedd and Cardiff areas (e.g. transport, shops, visiting attractions) during their visits.
- It is estimated that visitors to regular Urdd clubs and **sporting** events (e.g. Urban Games) spent £1.9 million on goods and services in different areas of Wales (e.g. transport, shops, visiting attractions) during their visits (figures have been rounded).
- Based on Eisteddfod **visitor survey data**, visitor spending in the Carmarthenshire area is estimated to be equivalent to £7.4m spent on the following:
 - £3.8m on private accommodation (e.g. hotels)
 - £1.7m with businesses from Wales on the Eisteddfod site (e.g. stalls, catering)
 - £1.5m on goods and services from other local businesses during their visit (e.g. restaurants, shops, transport).⁴
 - Additionally, competitors and visitors spend an estimated £0.5m while attending local and regional Eisteddfods in their local areas (figures have been rounded).

Indirect impact of the Urdd: £10.6m

Including:		
Eisteddfod visitor expenditure	£7.4m	
Expenditure by residential centre visitors	£1.3m	
Expenditure by visitors to sports clubs and events	£1.9m	

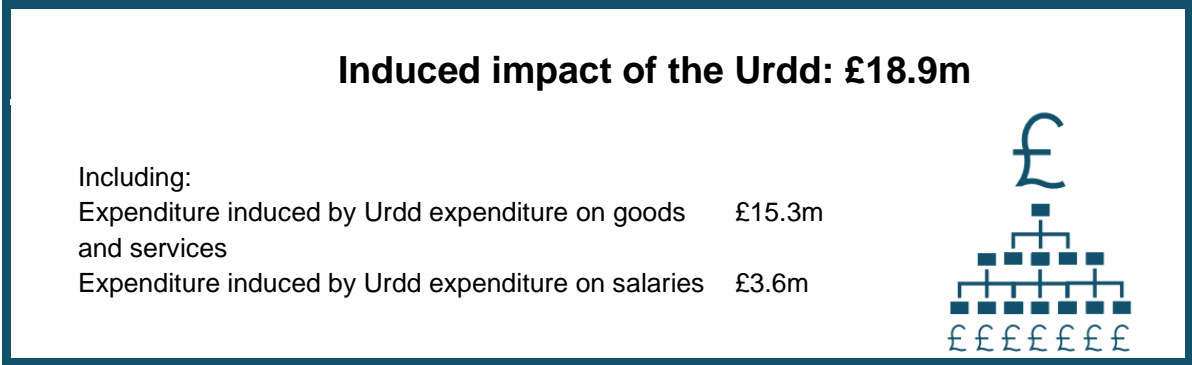
Induced impact in Wales

In terms of the **induced impact**, the data collected from a survey of the Urdd's suppliers suggests that, on average, businesses spend 90% of the income they earn (their marginal propensity to consume) and that 73% of that expenditure is on goods, services and staff

⁴ See section 2.5 for more details

salaries in Wales (retention rate).⁵ Data from a survey of Urdd staff combined with data on national saving rates was used to estimate that 41% of Urdd staff income is spent in Wales.

Using the above rates, the above direct and indirect expenditure is estimated to result in an induced impact of £18.9m.



Change since 2018

The data shows that the Urdd's economic value to Wales has increased from £25.5m in 2017-18 to £44.9m in 2022-23, an increase of 76%.

2.2 Economic value of Urdd residential centres

During 2022-23, the Urdd's residential centres in Llangrannog, Glan-Ilyn and Cardiff provided accommodation for over 103,000 visitor nights involving children, teachers and families as well as day visitors. The analysis shows that the Urdd's residential centres have generated an economic value of £7.9m in their local areas through a combination of:

- Direct expenditure by the residential centres on goods, services and staff
- direct capital expenditure on improvements to facilities
- local expenditure by visitors.

Analysis for the residential centres is presented individually below, including the value of Llangrannog residential centre in Ceredigion, Glan-Ilyn residential centre in Gwynedd and Cardiff residential centre in the capital.

⁵ This is generally consistent with average retention rates in previous surveys of Urdd suppliers as well as average net profitability rates for UK companies.

Llangrannog residential centre

Economic value of Llangrannog residential centre to Ceredigion: £3.2m



The analysis shows that the total economic value of the **Llangrannog residential centre to Ceredigion was £3.2m** in 2022-23. The Urdd's expenditure data shows that Llangrannog residential centre has had a **direct** impact of £2.2m in Ceredigion through expenditure of £0.5m on goods and services and £1.7m on staff pay.

Direct impact of Llangrannog in Ceredigion: £2.2m

Including:

Goods and services in Ceredigion £0.5m

Salaries of staff who live in Ceredigion £1.7m

In terms of the **indirect** impact, it is estimated that the 10,800 children and 800 teachers who visited the residential centre during 2022/23 spent, on average, £5 during their visit (mainly in local shops). It is estimated that the 1,875 families who stayed at the residential centre over the summer months also spent around £35 each during their visit. This equates to around £0.1m of local visitor expenditure. In addition, spending on transport to the residential centre by schools, organisations and individuals is estimated to be around £0.2m. Using this information, it has been estimated that **indirect** expenditure of £0.3m occurs in Ceredigion.

Indirect impact of Llangrannog in Ceredigion: £0.3m

Including:

Expenditure by visitors locally £0.1m

Expenditure on transport £0.2m

In terms of **induced impact**, data from the Urdd supplier survey and staff survey were used to estimate that the above direct and indirect spending stimulates further rounds of expenditure in the local economy amounting to £0.7m.

Induced impact of Llangrannog in Ceredigion – £0.7m


Including:

Expenditure induced by expenditure on goods and services £0.3m

Expenditure induced by expenditure on salaries £0.4m

In addition to the above, the Urdd spent around £0.5m of capital funding on improvements to the Pentre Ifan residential centre in north Pembrokeshire during 2022-23, the majority of which was on Welsh contractors.

Glan-Ilyn residential centre

<p>Economic value of Glan-Ilyn residential centre to Gwynedd: £3.2m</p>	
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The analysis shows that the total economic value of **Glan-Ilyn residential centre to Gwynedd was £3.2m** in 2022-23. The Urdd's expenditure data shows that Glan-Ilyn residential centre had a **direct** impact of £2.2m in Gwynedd's economy through expenditure of £0.9m on goods and services and £1.3m on staff salaries.

Direct impact of Glan-Ilyn in Gwynedd: £2.2m

Including:

- Goods and services in Gwynedd £0.9m
- Salaries of staff who live in Gwynedd £1.3m

In terms of **indirect** impact, the analysis estimates that visitors (including children, teachers and day visitors) to the residential centre spend, on average, around £4 during their visit (mainly through spending in local shops). In addition, visitors were estimated to spend a total of £0.2m on transport. Using this data along with annual visitor numbers (around 27,000), it has been estimated that **indirect** spending of around £0.3m occurs locally.

Indirect impact of Glan-Ilyn in Gwynedd: £0.3m

Including:

- Expenditure by visitors locally - £0.1m
- Expenditure on transport - £0.2m

In terms of **induced impact**, data from the supplier survey and staff survey were used to estimate that the above direct and indirect spending stimulates further rounds of expenditure in the economy amounting to £0.8m.

Induced impact Glan-Ilyn in Gwynedd: £0.8m*

Including:

Expenditure induced by expenditure on goods and services £0.4m

Expenditure induced by expenditure on salaries £0.3m

*Figures have been rounded therefore do not correspond to the sums shown.

Cardiff residential centre

Economic value of Cardiff residential centre to Cardiff: £1.4m



Caerdydd

The analysis shows that Cardiff residential centre's total economic value to **Cardiff's economy is estimated at £1.4m** in 2022-23. Urdd expenditure data shows Cardiff residential centre has a **direct** £0.5m impact in Cardiff's economy through £0.2m spending on goods and services and £0.3m on salaries for staff living in the capital.

Direct impact of Cardiff residential centre in Cardiff: £0.5m

Including:

Goods and services in Wales £0.3m

Salaries of staff who live in Wales £0.2m

In terms of **indirect** impact, it has been estimated that visitors to the residential centre (including children, teachers and day visitors) spend, on average, £32.50 during their visit (through spending on activities, shopping and entertainment while in the city as well as spending on transport). Using this estimate together with the annual visitor numbers (12,872), it was estimated that **indirect** expenditure of £0.4m occurred locally. Visitors are also estimated to spend around £0.2m on transport.

Indirect impact of Cardiff residential centre in Cardiff: £0.6m

Including:

Expenditure by visitors locally £0.4m

Expenditure on transport £0.2m

In terms of **induced impact**, data from the Urdd supplier survey and staff survey were used to estimate that the above direct and indirect spending triggered further rounds of spending amounting to £0.4m.

Induced impact Cardiff residential centre in Cardiff: £0.4m

Including:

Expenditure induced through expenditure on goods and services £0.3m

Expenditure induced through expenditure on salaries – less than £0.1m

2.3 Economic value of Urdd sports activities

Economic value of the Urdd sports department to Wales: £6.1m



The Urdd's sporting activities generated £6.1m of economic value in Wales – through direct expenditure by the Urdd's sports department and expenditure by 28,000 participants in clubs, competitions, family activities and events such as Urban Games organised by the Urdd.

The Urdd's sports department spent a total of £0.6m in 2022-23 in Wales on goods and services. In addition, the department spent £1.1m on the salaries of staff living in Wales. The Urdd sports department's total direct impact on the Welsh economy was therefore £1.7m.

Direct impact of the Urdd's sports department: £1.7m

Including:

Goods and services in Wales £0.6m

Salaries of staff who live in Wales £1.1m

In terms of **indirect** impact, the Urdd's figures on the numbers attending various activities were used and visitors' expenditure on goods and services while attending these activities was estimated.⁶ This was estimated to amount to £1.9m.

Indirect impact of the Urdd's sports department: £1.9m

Including:

Expenditure by 28,000 attendees of sports clubs, competitions and other events £1.9m

In terms of the **induced impact**, the same rates as the national analysis were used to estimate that the above direct and indirect expenditure stimulated further rounds of expenditure in the Welsh economy amounting to £2.5m.

Induced impact of the Urdd's sports department: £2.5m

Including:

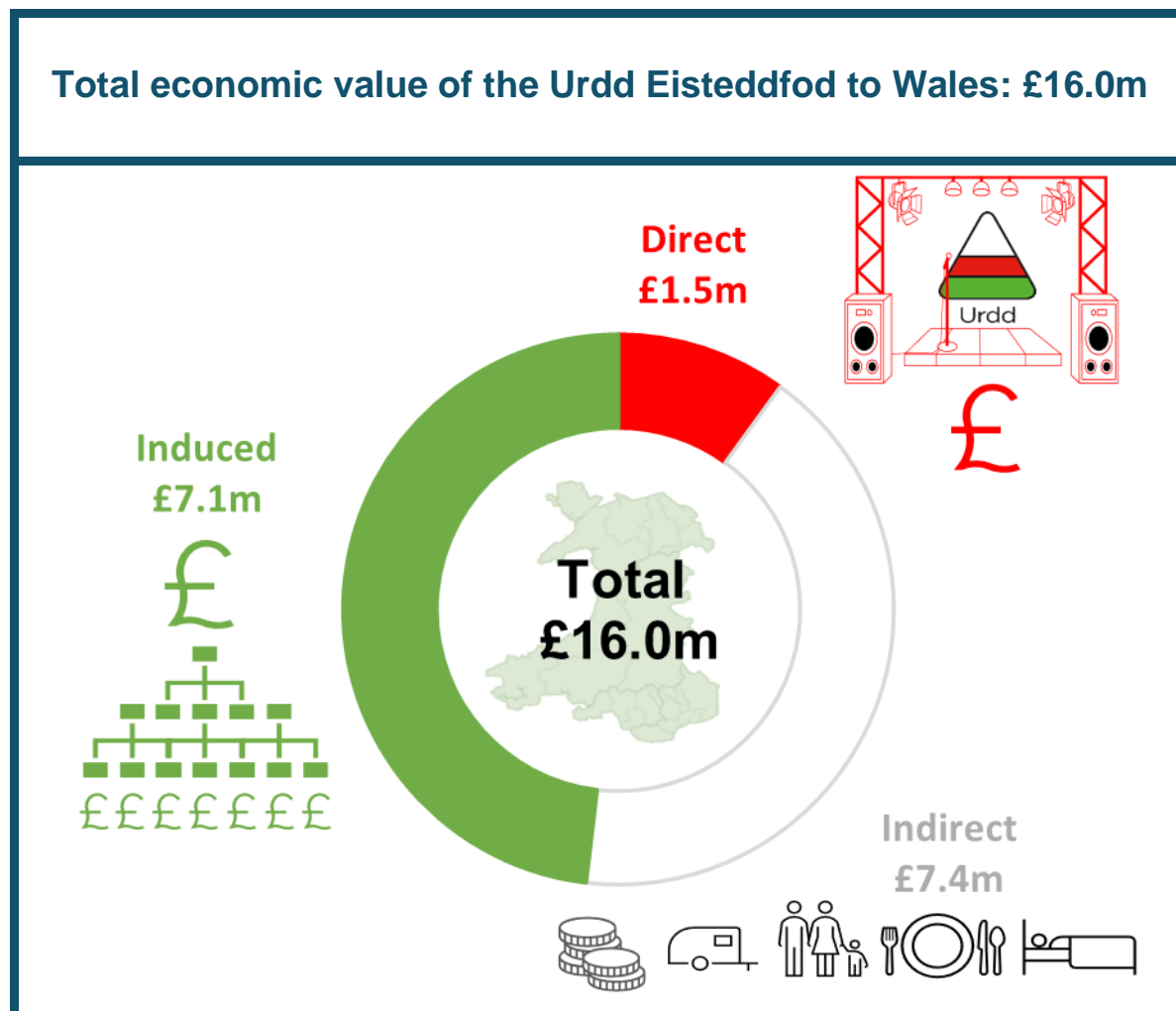
Expenditure induced by expenditure on goods and services £2.0m

Expenditure induced by Urdd expenditure on salaries £0.5m

⁶ It was estimated that the following expenditure was stimulated locally by children and families attending events: 8,000 visiting the Urban Games in Cardiff spending an average of £12.50 per person, with 250 staying overnight; 8,000 at weekly sports clubs - £5 per person per week (assuming attendance for 40 weeks a year); 5,000 attending the Urdd 7-a-side rugby tournament in Cardiff, 1,000 parents attending primary sporting activities with their children, 2,500 at beach rugby activities in the south and north, 1,400 at the national netball competition – spending an average of £12.50 per person.

2.4 Economic value of the Urdd Eisteddfod to Wales

The analysis shows that the 2023 Urdd Eisteddfod is estimated to have generated an economic value of **£16.0m in Wales**.



Direct impact of the Urdd Eisteddfod in Wales

Expenditure data from the Urdd shows that the organisation spent a total of:

- £1.9m on goods and services associated with hosting the 2023 Urdd Eisteddfod, with 59% of this (£1.1m) spent with suppliers based in Wales
- £0.4m on the salaries of staff who all live in Wales.

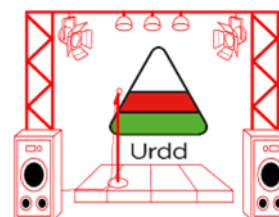
This means that the Urdd Eisteddfod's **direct** impact on the Welsh economy in 2022-23 was £1.5m.

Direct impact of the Urdd Eisteddfod in Wales: £1.5m

Including:

Goods and services in Wales £1.1m

Salaries of staff who live in Wales £0.4m



Indirect impact of the Urdd Eisteddfod in Wales

In terms of **indirect impact**, survey data was collected from visitors at the 2023 Urdd Eisteddfod. It is estimated, based on analysis of this data, that visitors spent £1.5m on local businesses (i.e. outside of the Eisteddfod site but in Carmarthenshire) and £1.7m with Welsh businesses on the site (stallholders, food and drink providers etc).

Visitors staying overnight locally (excluding respondents living in Carmarthenshire) were also asked how much they had spent on accommodation, for how many nights, and how many people were in their group. The analysis shows:

- that 30% of Eisteddfod visitors stayed overnight in private accommodation (e.g. hotel, bed and breakfast, private caravan park) in the local area
- that visitors who stayed overnight spent, on average, £61 per person, per night on accommodation during the 2023 Urdd Eisteddfod⁷
- these visitors stayed in the area, on average, for 2.8 nights.

Using this data, together with data on visitor numbers, it is estimated that visitors to the Eisteddfod spent a total of £3.8m on accommodation (e.g. hotels, private accommodation, private caravan sites) in the local economy.

In addition, it is estimated that the 90,000 competitors and visitors to local and regional Eisteddfods spent £0.5m while visiting these events in their local areas during 2023.

⁷ Expenditure on accommodation by those staying at the Eisteddfod caravan site was excluded from this analysis as this was a direct income to the Urdd. However, the spending of those staying at the Eisteddfod caravan site on other local goods and services was included in the analysis.

Indirect impact of the Urdd Eisteddfod in Wales: £7.4m*

Including:

Overnight visitor expenditure on accommodation	£1.5m
--	-------

Visitor expenditure with businesses from Wales on the Eisteddfod site	£1.7m
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Off-site visitor expenditure on food and drink, transport and other local goods	£3.8m
---	-------



Expenditure by visitors to local and regional Eisteddfods	£0.5m
---	-------

*Figures have been rounded and therefore the values shown do not always correspond to the total shown.

Induced impact in Wales

In terms of the **induced impact**, data collected through the Urdd's supplier survey suggests that, on average, businesses spend 90% of the income they earn (their marginal propensity to consume) and 73% of that expenditure is on goods, services and staff salaries in Wales (retention rate).⁸ National savings rates and expenditure data from a survey of Urdd staff was used to estimate that 41% of Urdd Eisteddfod staff income is spent in Wales.

Using these rates, the above direct and indirect expenditure is estimated to stimulate an induced impact of £7.1m.

Induced impact of the Urdd Eisteddfod in Wales: £7.1m

Including:

Expenditure induced by Urdd expenditure on goods and services	£6.9m
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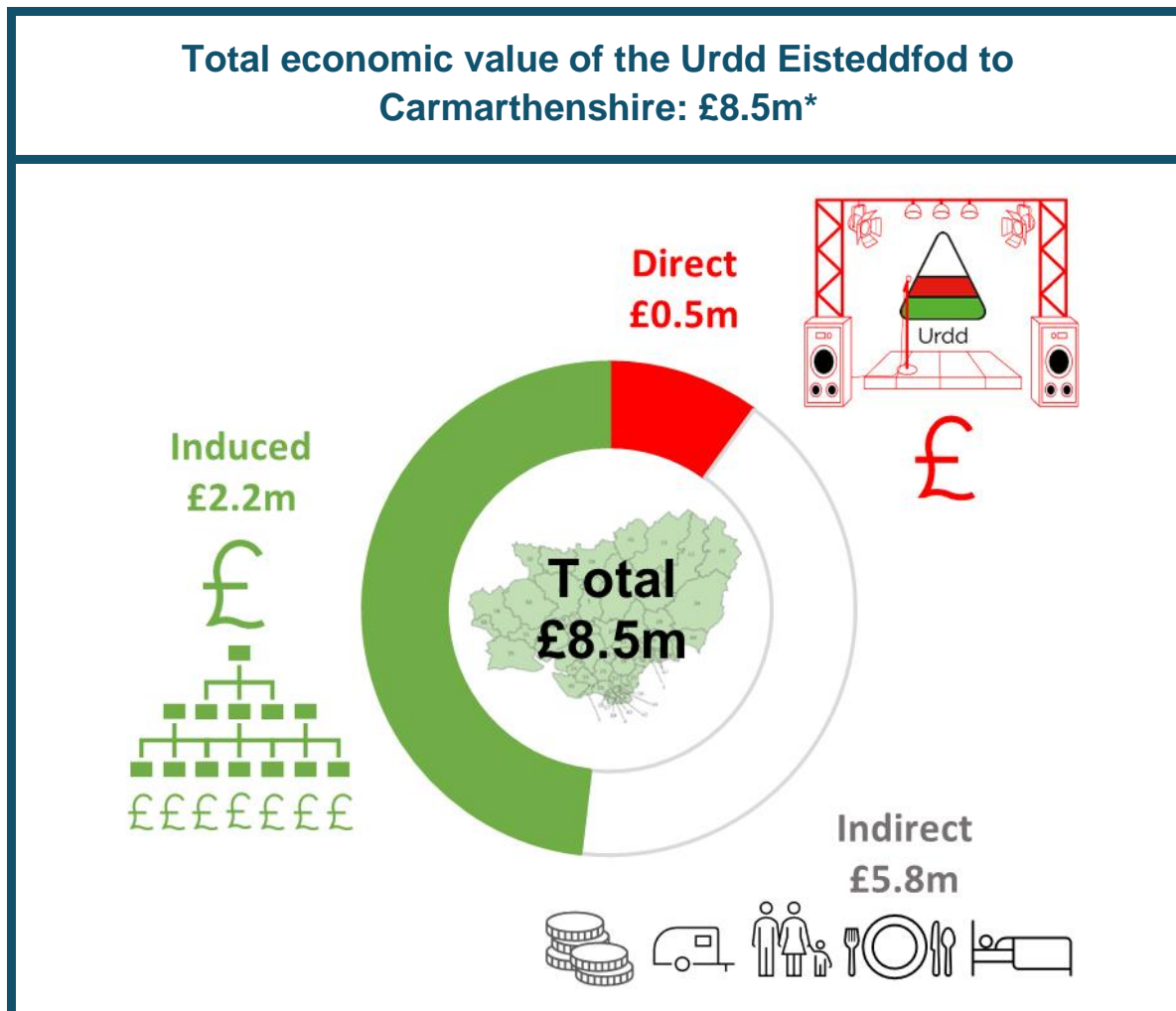
Expenditure induced by Urdd expenditure on salaries	£0.2m
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⁸ This is generally consistent with average retention rates in previous surveys of the Urdd's suppliers as well as average net profitability rates for UK companies.

2.5 Economic value of the Urdd Eisteddfod in Carmarthenshire

The analysis shows that the 2023 Urdd Eisteddfod is estimated to have generated an economic value of **£8.5m in the Carmarthenshire area**.



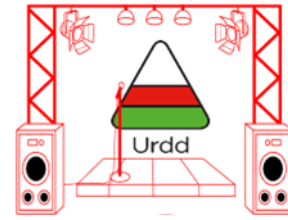
*Figures have been rounded and therefore the values shown do not always correspond to the total shown.

Direct impact in Carmarthenshire

The Urdd Eisteddfod department spent a total of £0.5m in 2022-23 in Carmarthenshire on goods, services and salaries for staff and freelance workers. This represents the total **direct** impact of the Eisteddfod on the economy of Carmarthenshire.

Direct impact of the Urdd Eisteddfod in Carmarthenshire: £0.5m

Including:	
Goods and services in Carmarthenshire	£0.4m
Staff salaries and freelance workers in Carmarthenshire	£0.1m

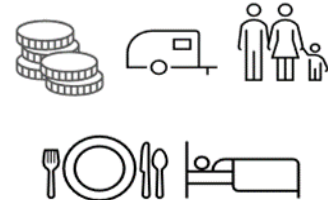


Indirect impact in Carmarthenshire

In terms of **indirect impact**, survey data was collected from visitors at the 2023 Urdd Eisteddfod (see section 2.3 above). Using this, alongside Eisteddfod visitor number data, it is possible to estimate that visitors spent £1.5m on local businesses (e.g. shops, restaurants, transport), £3.8m on accommodation locally and £0.6m with Carmarthenshire-based businesses on the Eisteddfod site (e.g. stalls, food vendors).

Indirect impact of the Urdd Eisteddfod in Carmarthenshire: £5.8m*

Including:	
Overnight visitor expenditure on accommodation	£3.8m
Visitor expenditure with businesses from Carmarthenshire on the Eisteddfod site	£0.6m
Off-site visitor expenditure on food and drink, transport, other local goods	£1.5m



*Figures have been rounded and therefore the values shown do not always correspond to the total shown.

Induced impact in Carmarthenshire

In terms of **induced impact**, the same consumption and retention rates as the national analysis were used to estimate that the above direct and indirect expenditure stimulated further rounds of spending in the Carmarthenshire economy amounting to £2.2m.

Induced impact the Urdd Eisteddfod in Carmarthenshire: £2.2m

Including:	
Expenditure induced by Urdd expenditure on goods and services	£2.2m
Expenditure induced by Urdd expenditure on salaries	Less than £0.1m



Return on investment

The Urdd Eisteddfod had an income of £2.3m in 2023. By dividing the 2023 Urdd Eisteddfod's total economic impact (£16.0m) by this income figure, it can be shown that the Urdd Eisteddfod generated an economic value of £6.96 in Wales for every £1 of income received.

3. Impact of Urdd activities on young people

The Urdd provides opportunities for young people from all parts of Wales to take part in activities relating to sport, culture, arts, community, and international activities. Young people who had taken part in Urdd activities during the summer of 2023 were surveyed to gather their views on how these activities had affected their skills, confidence and views on the Welsh language and Welsh culture. A total of 103 young people completed the survey between August and October 2023.

The young people who completed the survey were asked, to what extent they agreed with the statements set out in the sections below.

3.1 Social skills

The survey findings offer a strong indication that young people feel that participation in Urdd activities improves their social skills. Most respondents believe that their participation in activities has improved their social skills and confidence as well as their ability to communicate with others.

After taking part in the Urdd's activities, I feel more confident...

- ... in social situations
 - **89% agreed** (39% strongly agreed and 50% agreed)
- ... to take part in activities with others
 - **93% agreed** (46% strongly agreed and 48% agreed)
- ... when communicating
 - **87% agreed** (40% strongly agreed and 47% agreed)
- ... to speak Welsh
 - **89% agreed** (64% strongly agreed and 25% agreed).

3.2 Skills and attitudes towards the Welsh language

The responses below outline that the vast majority of survey respondents feel that participating in Urdd activities improves their Welsh language skills and attitudes towards the language. This is clearly important as it supports one of the Urdd's key aims i.e. supporting the Welsh language. It also illustrates how the Urdd's activities support other strategic priorities including the *Cymraeg 2050* goal of reaching a million Welsh language speakers.

After taking part in the Urdd's activities I...

- ... feel more positively about the Welsh language
 - **92% agreed** (65% strongly agreed and 27% agreed)
- ... am more likely to use Welsh
 - **88% agreed** (55% strongly agreed and 33% agreed)
- ... feel I understand more about Wales
 - **73% agreed** (32% strongly agreed and 41% agreed).

3.3 Wellbeing and emotional skills

Urdd activities often create opportunities for young people to have new experiences that have a positive influence on their wellbeing and emotional skills. The findings below indicate that activities are delivered in a friendly and inclusive environment and, according to the responses, this appears to have a positive impact on the wider confidence and self-esteem of those taking part.

After taking part in the Urdd's activities I...

- ... feel more ready to take part in new activities
 - **93% agreed** (49% strongly agreed and 44% agreed)
- ... am more willing to share my opinion
 - **80% agreed** (32% strongly agreed and 48% agreed)
- ... better understand that my contribution is as valuable as that of others
 - **83% agreed** (37% strongly agreed and 46% agreed)
- ... am more likely to ask for help when I need it
 - **70% agreed** (31% strongly agreed and 39% agreed) – 23% were unsure
- ... know that I have a number of positive attributes
 - **88% agreed** (30% strongly agreed and 58% agreed)
- ... feel prouder of myself
 - **89% agreed** (43% strongly agreed and 47% agreed)

3.4 Enjoyment of Urdd activities

The responses below suggest that young people enjoy taking part in Urdd activities and make friends in doing so. These findings are important in ensuring that the Urdd is able to encourage young people to take part in further activities and therefore further strengthen their linguistic and social and emotional skills.

Whilst taking part in the Urdd's activities I...

- ...had fun
 - **100% agreed** (79% strongly agreed and 21% agreed)
- ...made friends
 - **90% agreed** (60% strongly agreed and 30% agreed)

Full survey results are available in Appendix 1.

4. Impact of the Urdd's youth and community activity

The Urdd through its youth and community work offers unique opportunities and experiences for young people across Wales including:

- Volunteering opportunities
- Residential experiences
- Courses and accreditations
- Community and school clubs
- Youth Forums
- International trips
- Youth Theatre.

Through the Urdd's youth work, young people are provided with opportunities to meet new people, learn new skills, organise events of their own and make a positive contribution to society.

A number of studies show that youth work, as offered by the Urdd, adds value to a statutory curriculum, contributes towards levels of academic attainment and reduces the risk of young people being out of work, education and training (NEET)⁹.

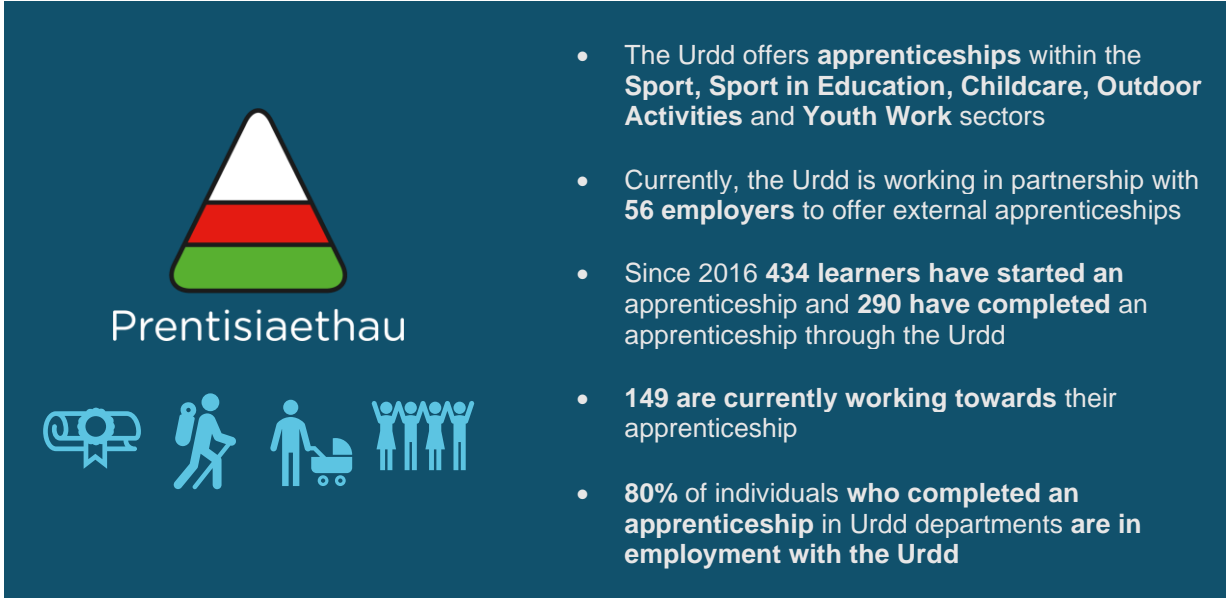
Research by Frontier Economics in 2022 and the Welsh Government's Youth Work Finance Review 2023 seek to measure the value of youth work. The Frontier Economics study refers to an estimated return on investment of between £3.20 and £6.40 for every £1 invested in youth work. The Welsh Government's Youth Work Finance Review refers to calculating the total value of social work in Scotland where it is estimated to provide a return of £7 for every £1 spent.

The Urdd's youth and community department spent £1.5m in 2022-23. If, based on the above findings, we use the most conservative estimate of return on investment of £3, this would suggest that the social value of the Urdd's youth and community department spending could be £4.5m.

⁹ [Youth work in schools](#) (Arad, 2015)

5. Apprenticeships

In April 2023, the Urdd was delivering apprenticeship programmes to 149 individuals through collaboration with 52 employers across Wales.



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- The Urdd offers **apprenticeships** within the **Sport, Sport in Education, Childcare, Outdoor Activities** and **Youth Work** sectors
- Currently, the Urdd is working in partnership with **56 employers** to offer external apprenticeships
- Since 2016 **434 learners have started an apprenticeship** and **290 have completed an apprenticeship** through the Urdd
- **149 are currently working towards** their apprenticeship
- **80% of individuals who completed an apprenticeship** in Urdd departments **are in employment with the Urdd**

Through its Apprenticeship Department, the Urdd offers free Welsh-medium or bilingual training to apprentices and employers across Wales. The scheme is funded by the Welsh Government, and the apprenticeships are available to anyone over the age of 16 working within the following fields.

- Primary, Secondary, Special Schools
- Leisure Centres
- Sports venues or clubs
- Outdoor Centres
- Day Nurseries, *Cylchoedd Meithrin* (Welsh-medium nursery provision) and nurseries within schools
- Youth provision

Apprenticeships last between 15 – 21 months, depending on which framework learners complete.

The Urdd provides apprenticeships to its own staff, within its Sports department and Residential Centres. This means that the Urdd can nurture talent and develop a competent and experienced Welsh medium and bilingual workforce. Apprenticeship training is provided to employees of other companies and organisations across Wales, including leisure centres, county councils, schools, and outdoor centres.

Apprenticeships undertaken range from Level 2 in Leading Activities to Level 5 in Care, Play and Child Development. These qualifications are recognised within the world of work across the UK.

Since 2016, 434 individuals have started an apprenticeship and 290 have completed their course, with 149 still undertaking their apprenticeship. Individuals from all local authorities in Wales have undertaken an apprenticeship through the Urdd. A majority of individuals undertaking an apprenticeship with the Urdd each year are aged between 18 and 25, with a third of apprentices over the age of 25. In 2022/2023 the programme has attracted individuals from different backgrounds, with 4 of the current apprentices from non-white backgrounds. This not only supports greater diversity and equality within the Urdd's workforce, but also supports greater diversity among the workforce of other employers in the sectors listed above as they develop more capacity to provide services in Welsh or bilingually.

An average of 85 learners start apprenticeship programmes with the Urdd annually. Of these, 30 of are employed by the Urdd and the remainder are employed with other organisations across Wales.

Feedback from apprentices shows that the vast majority believe they have had positive experiences through taking part in apprenticeships with the Urdd and gained valuable skills in the process (see learner voice responses below). Feedback received by the Urdd on the destinations of apprentices shows that 85% of them (290 out of the 339 apprentices trained up to 2022) had either continued in a job, accepted new employment or continued in education, within 3 months of completing the apprenticeship.

5.1 Essential skills hub (HWB)

The Urdd's Essential skills hub (HWB) provides Essential Skills qualifications through the medium of Welsh or bilingually, throughout Wales. The vision of the HWB is to ensure that the Welsh language receives the same priority as English when completing Essential Skills qualifications. The HWB's services support apprentices and, by offering bilingual provision, ensure that all apprentices, including those who have little confidence in using Welsh, can improve and expand on their Welsh language communication skills.

The HWB also offers Essential Skills qualifications for other learners across Wales and other further education providers and colleges now refer their learners to the HWB to enable them to access these qualifications in Welsh or bilingually if they wish.

5.2 Apprenticeship programmes offered by the Urdd

The Urdd supports apprenticeships within the following areas.

- Leading Activities – Level 2
- Sports Development – Level 3
- Outdoor Programmes – Level 3
- Childcare, Play, Learning and Development – Level 2 and Level 3
- Supporting Learning and Teaching in Physical Education and School Sport
- Youth Work Practice - Level 2 and Level 3
- Care, Play and Child Development Leadership and Management – Level 5

Further details on these qualifications are available in Appendix 2

5.2 Learner voice

A total of 45 Urdd apprentices completed a 'learner voice' survey in 2022/23. Response data shows that the apprentices felt their skills were developing well, including Welsh language skills, and that learners felt well supported by the Urdd:

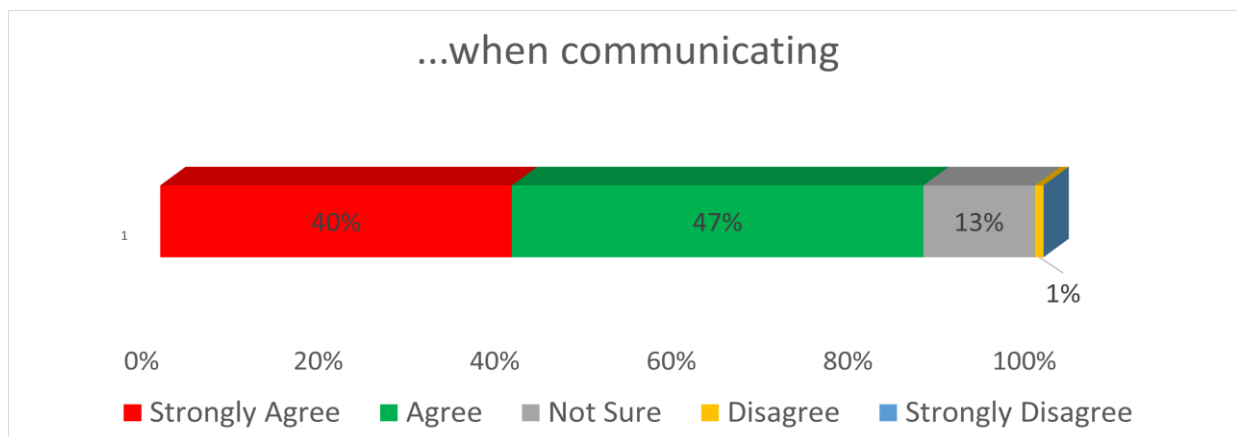
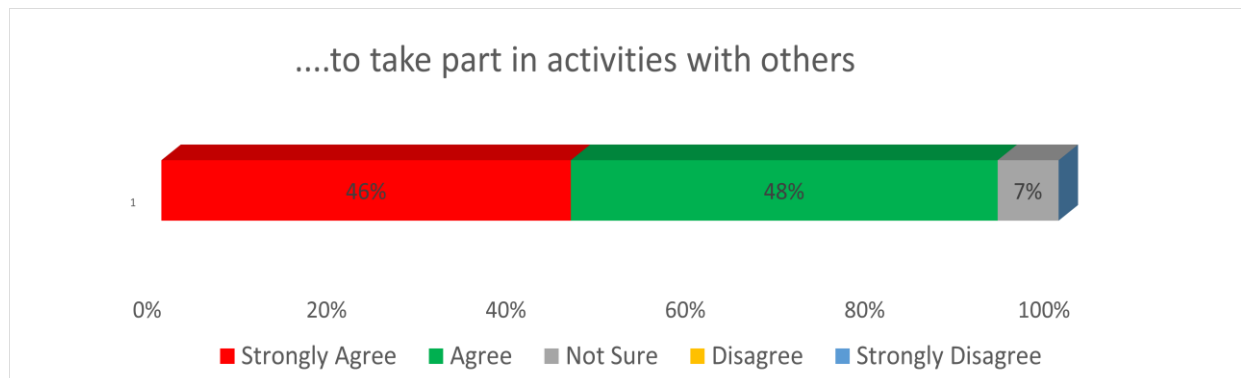
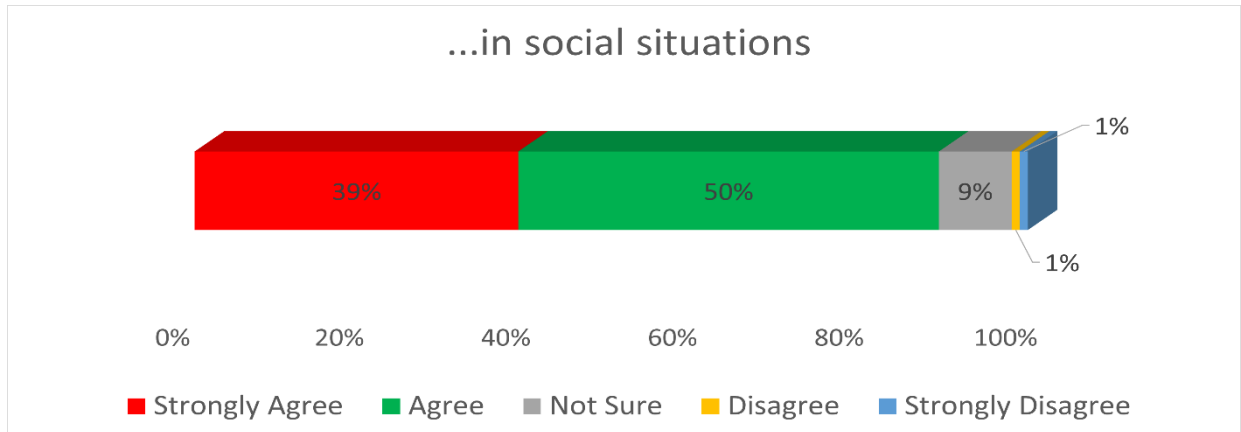
- 87% of apprentices who responded felt their communication, numeracy and digital literacy skills were being developed by their assessor/tutor.
- 98% of apprentices reported that they often use Welsh on their course or in the workplace.
 - 96% reported that they often saw the Welsh language.
 - 98% reported hearing Welsh often.
- Most learners felt that practitioners (instructors/assessors) included learners in the planning process.
- A majority of apprentices felt practitioners provided feedback that supported them well.
 - 44% noted very good, 33% fairly good, 16% good, 7% not very good.
- 90% of learners believed that the Urdd used e-portfolio systems well.
- 95% of learners believed that the Urdd used digital communication well.
- 97% of learners believed that the information given to them at the beginning of the programme was clear.
- All learners felt staff helped them settle into their course well, with 77% responding 'very well'.

6. Annex 1 - Urdd activity participant survey results

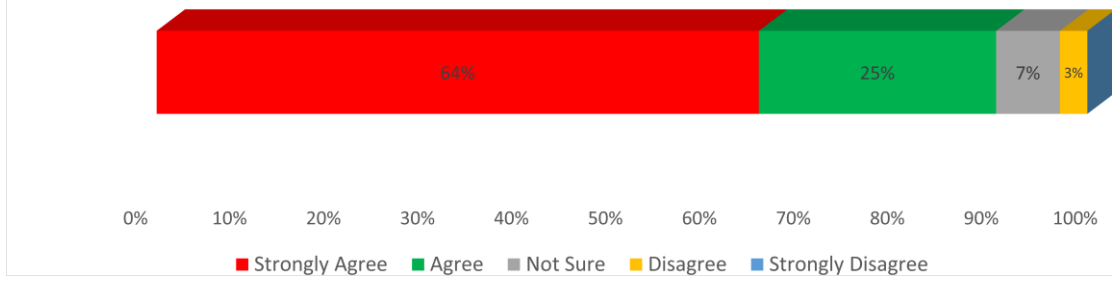
The appendix below contains results from a survey of young people who took part in Urdd activities in summer 2023. The number of survey respondents was 103.

Social skills

- After participating in Urdd activities, I feel more confident...

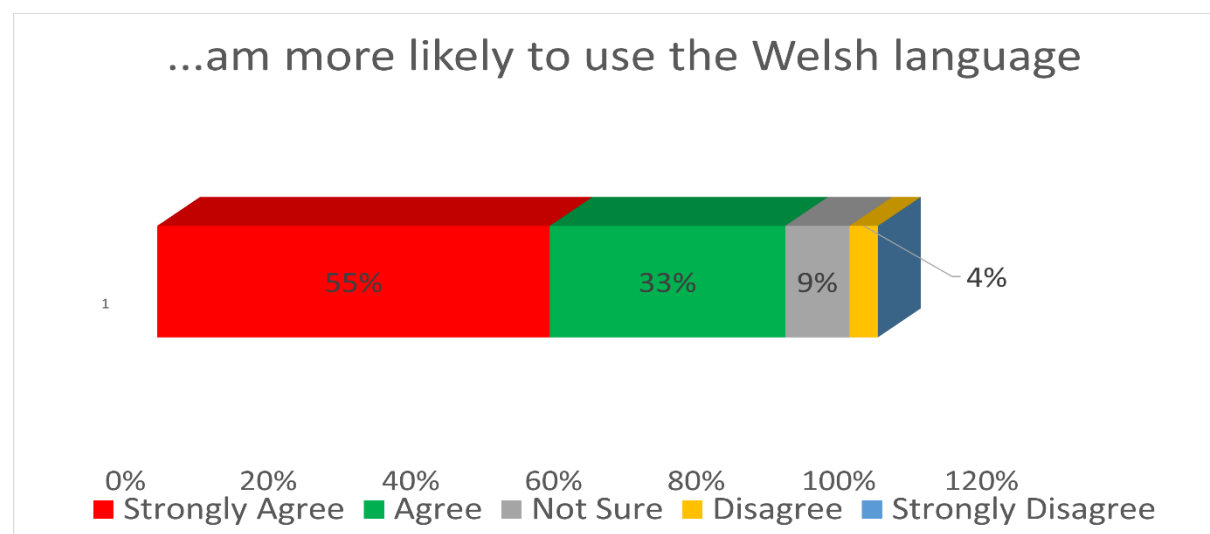
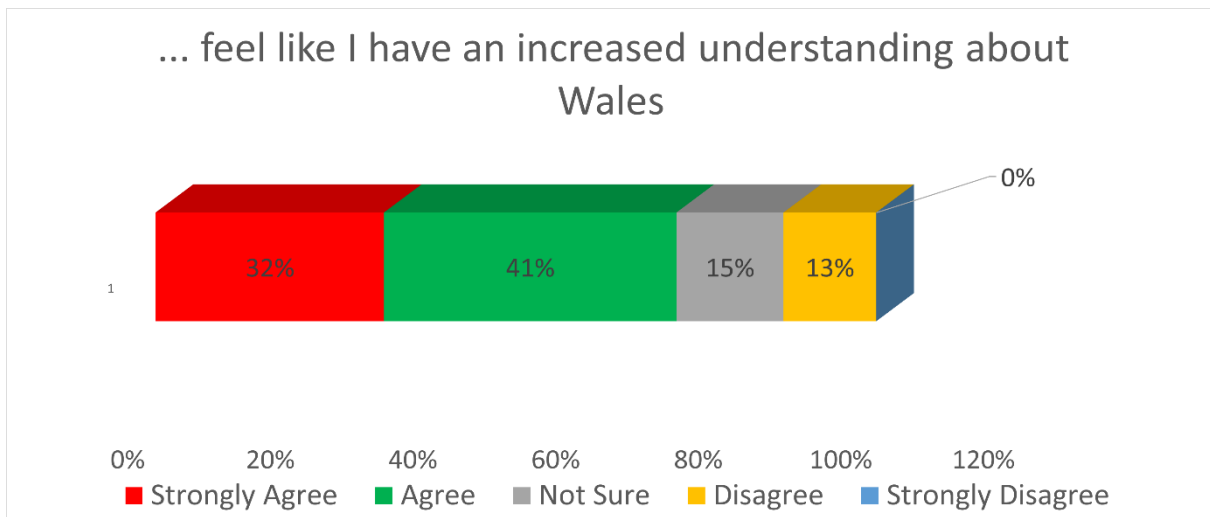
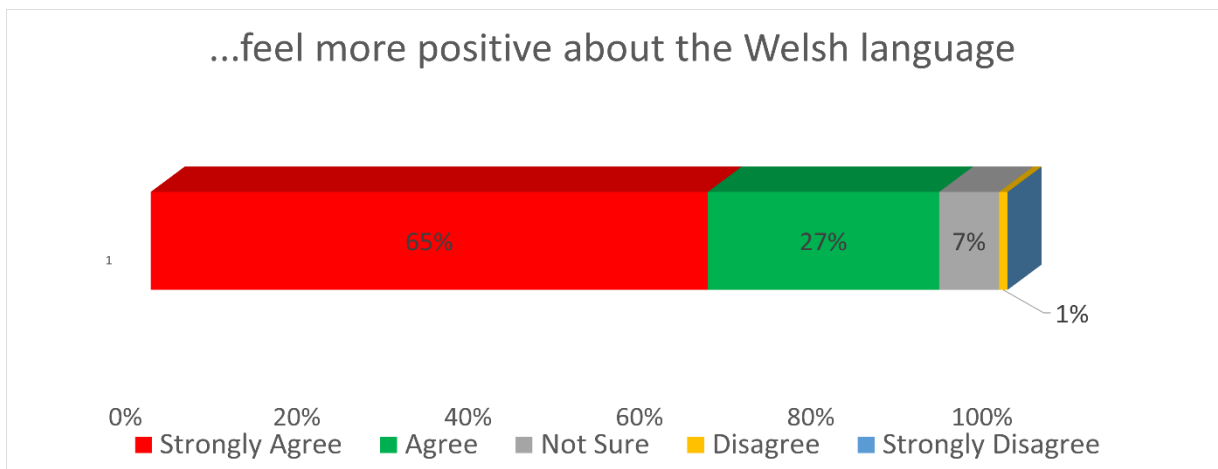


...to speak Welsh



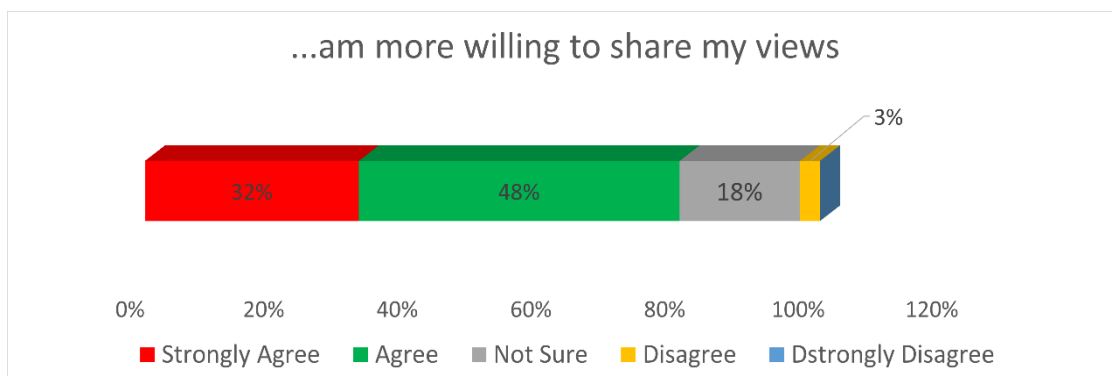
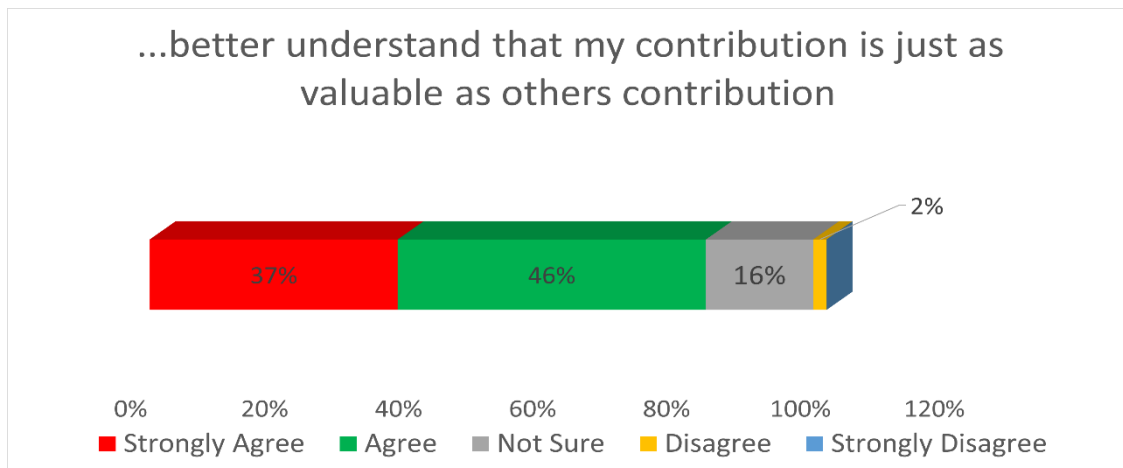
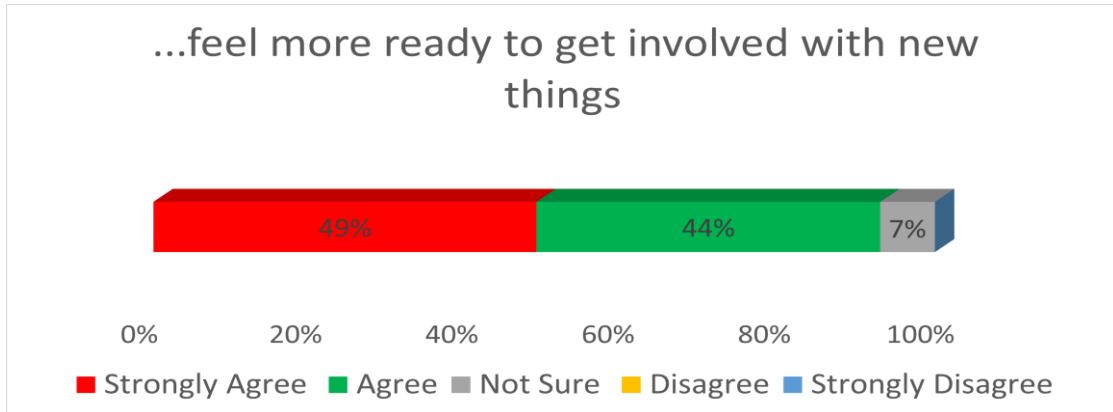
Skills and attitudes towards the Welsh language

- After taking part in Urdd activities, I...

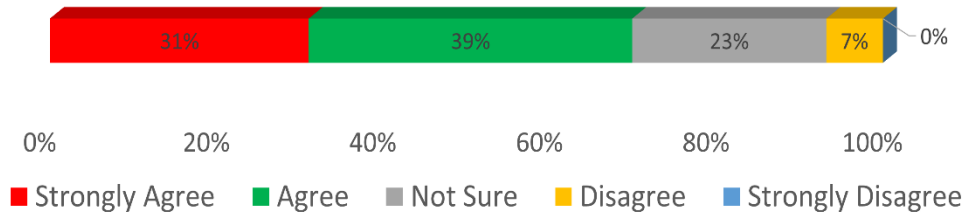


Emotional skills and wellbeing

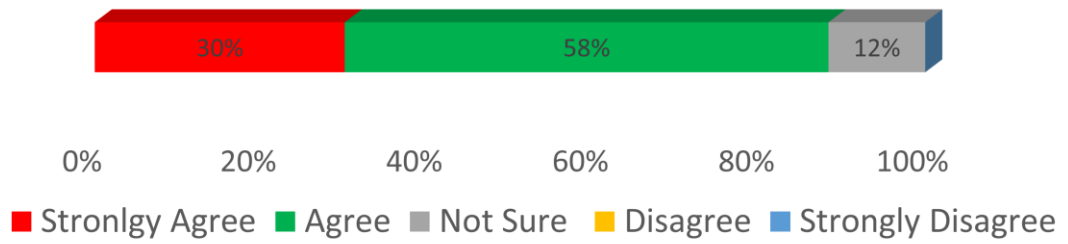
- After taking part in Urdd activities, I...



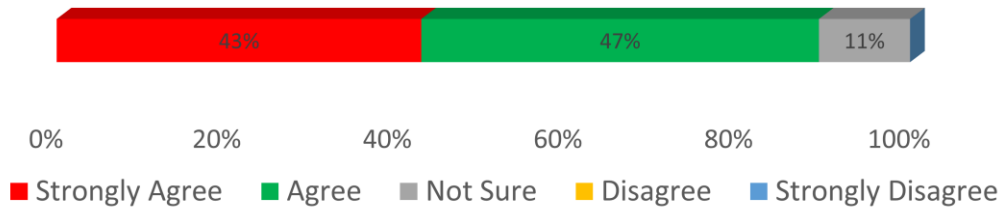
...am more likely to ask for help when I need



...know that I have a number of important qualities

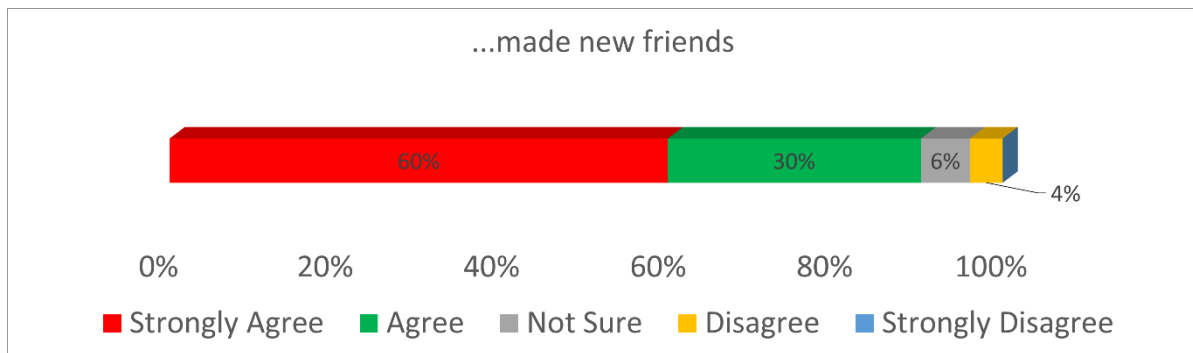
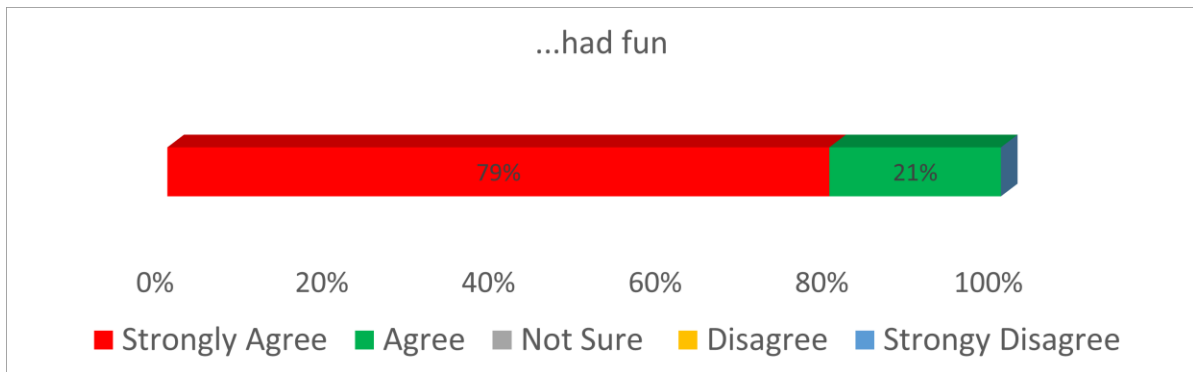


...am prouder of myself



Enjoying the activities

- While taking part in the Urdd's activities, I...



Annex 2 – Urdd Apprenticeship Qualifications and Learning Programmes



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Activity Leadership Framework

- Level 2 Apprenticeship in Leading Activities (Leadership pathway) Sport
- Level 2 Apprenticeship in Leading Activities (Leadership pathway) Outdoors
- Level 2 Apprenticeship in Leadership Activities (Leadership pathway) Schools

Sports Development Framework

- Sports Development Level 3 Apprenticeship
- Sports Development Level 3 Apprenticeship

Outdoor Programme Framework

- Level 3 Apprenticeship in Outdoor Programmes

Youth Work Framework

- Youth Work Level 2 Apprenticeship
- Youth Work Level 3 Apprenticeship

Childcare, Play, Learning and Development Framework

- Level 3 Apprenticeship in Childcare, Play, Learning and Development

Activity Leadership Framework

- Level 2 Apprenticeship in Leadership Activities (Leadership pathway) Coaching
- Level 2 Apprenticeship in Leading Activities (Leadership pathway) Outdoors
- Level 2 Apprenticeship in Leadership Activities (Leadership pathway) Schools
- Level 2 Apprenticeship in Leading Activities (Leadership pathway) Leisure

Sports Development Framework

- Sports Development Level 3 Apprenticeship

Leisure Management Framework

- Leisure Management Level 3 Apprenticeship

Outdoor Programme Framework

- Level 3 Apprenticeship in Outdoor Programmes

Youth Work Framework

- Youth Work Practice Level 2 Apprenticeship
- Youth Work Practice Level 3 Apprenticeship

Childcare, Play, Learning and Development Framework

- Level 2 Apprenticeship in Care, Play, Learning and Child Development
- Level 3 Apprenticeship in Childcare, Play, Learning and Development
- Level 4 Apprenticeship in Professional Practice Childcare, Play, Learning and Development
- Level 5 Apprenticeship in Care, Play, Learning and Child Development Leadership and Management