

Scarlets

Economic and social impact assessment

Final report



Contents

Executive Summary..... 1

1. Introduction..... 2

2. Quantified economic impacts..... 5

3. Social and community impacts..... 14

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Executive Summary

In 2024/25, Scarlets generated £17.3 million in economic value, supporting 336 jobs and 266 direct suppliers

- Scarlets are at the heart of the community – a national sporting asset and central to local identity and heritage.
- This report demonstrates that the club also drives a substantial impact on the local economy. Directly employing 112 people, it is one of Llanelli's largest employers – and taking account of jobs in the supply chain and the knock-on effect of additional spending in the economy, it supports an estimated 336 jobs in total.
- The club generates around £17.3 million in annual gross value added. It is also an important link in the local supply chain – trading with 266 supplier companies in 2024/25, including smaller businesses in Carmarthenshire. It has 101 sponsorship partners, providing a showcase for some of the region's most important locally-based businesses, and putting Carmarthenshire on the map as an investment location.
- Parc y Scarlets is a key regional asset. With capacity of 15,400, it is the fifth largest stadium in Wales, and the third largest rugby stadium. As well as 72,000 people attending matches in 2024/25, it also welcomed 19,000 people to non-match events.

Scarlets drive community activity, with health, wellbeing and inclusion benefits

- Beyond these numbers, Scarlets generates substantial social value. This includes a major programme of engagement with the local community, delivering some 786 primary school skill sessions in 2024/25, 86 Inclusive Community Club sessions, and a range of activities supporting involvement in sport for all ages and abilities, including activity delivered in partnership with the local authorities to support access to sport for children in disadvantaged communities. It plays a central role in driving community participation in rugby and supporting active, healthier lives, and through the Scarlets Community Foundation, the club's charitable arm, it makes a major contribution to the delivery of the Wellbeing of Future Generations Act.
- With the most dispersed population base of all Wales' rugby regions, and in the context of significant economic challenges, especially in Llanelli, Scarlets are an anchor of the local economy – rooted in the local community and delivering economic and social value beyond the inherent value of the sport.

1. Introduction

Introducing Scarlets...

- 1.1** One of Wales' four professional rugby union clubs, Scarlets play a central role in Welsh rugby and in the development of the sport in South West Wales.
- 1.2** Established in 2003 with the formation of the Welsh regional rugby system, the club builds on Llanelli's long rugby heritage, producing several Wales international players and currently competing in the United Rugby Championship and the Investec Champions Cup. It is also affiliated with some 52 local clubs across Carmarthenshire, Ceredigion and Pembrokeshire, including the semi-professional Super Rygbi Cymru teams Carmarthen Quins and Llandovery RFC. Through the Scarlets Academy, it works to develop home-grown player talent, and also supports a charitable Community Foundation, offering opportunities for schools, youth rugby and participation in sport in the wider community.
- 1.3** Since 2008, the club has been based at Parc y Scarlets, in Pemberton, Llanelli. As well as providing a purpose-built, 15,400-capacity stadium for Scarlets rugby, The fifth largest stadium in Wales (and the third largest rugby stadium¹), Parc y Scarlets is a major venue for hospitality and events and an important leisure asset for Carmarthenshire, easily accessible to the town centre. In August 2025, Scarlets announced significant new investment, following a proposal by the US-based company House of Luxury to take a majority stake in the club².

... and the economic and social impact statement

- 1.4** Scarlets play an undoubtedly important role in the sporting, community and social life of Carmarthenshire and Wales as a whole. However, the extent of this has not recently been formally assessed: the last impact assessment was undertaken in 2012³, pre-dating the significant shock of the Covid-19 pandemic.
- 1.5** In this context, Carmarthenshire County Council, in conjunction with Scarlets Rugby, commissioned SQW to prepare a fresh analysis of the club's economic and social impact. This report sets out:
 - The quantified economic impacts of Scarlets' activities. This includes an estimate of the total employment generated by the club, as well as the estimated monetised impact on the economy, measured in gross value added

¹ After the Principality Stadium and the Swansea.com Stadium

² [Wales Online](#), (8 August 2025)

³ Focus Consulting (2012), Parc y Scarlets and Scarlets: Review of economic and social impact

- Wider social and community impacts. These are generally not possible to monetise, but they are central to Scarlets' purpose. They are quantified wherever possible, and described in narrative terms where not.

1.6 The analysis draws on data provided by Scarlets, as well as published data sources and estimates derived from previous research. The methodology – and the caveats associated with it – are explained where relevant.

The strategic and economic context

1.7 While Scarlets are of national importance in sporting terms, the club is strongly rooted in Llanelli and its wider hinterland. With a population of around 51,000, Llanelli is Carmarthenshire's largest town and the primary centre for the south east of the county. Once famous as 'tinopolis', the global centre for the tinplate industry and with a long heritage of industrial innovation, Llanelli retains a significant manufacturing base, especially in the automotive sector.

1.8 Beyond Llanelli, the wider county of Carmarthenshire is substantially rural, with a population of around 188,000 distributed across Llanelli itself, the other larger towns of Ammanford and Carmarthen, and a network of smaller towns and villages. The neighbouring counties of Ceredigion and Pembrokeshire – which with Carmarthenshire form the Scarlets region – are also largely rural, with the consequence that the Scarlets' regional population base is more dispersed than that of the other South Wales professional clubs, and Scarlets have a larger geographical footprint than all the other rugby regions.

1.9 Historically, Carmarthenshire has faced economic challenges, linked with industrial transition and relative remoteness, many of which have been especially pronounced in Llanelli. Economic activity and employment rates are lower in Carmarthenshire than in the UK as a whole, and this is reflected in per capita income levels, which are around 80% of the UK average⁴. The county experiences net out-commuting (principally to Swansea), and the wages earned by those travelling out of the county for work are, on average, lower than those commanded by those who work locally. Within the immediate vicinity of Parc y Scarlets, south Llanelli contains some of the most deprived communities, not just in Carmarthenshire, but in Wales as a whole⁵.

1.10 However, Carmarthenshire's emerging economic strategy⁶ highlights two economic opportunities that are especially relevant to Scarlets' position within the local economy:

⁴ ONS, Gross Disposable Household Income, 2021

⁵ Welsh Government (2019), [Welsh Index of Multiple Deprivation](#). Part of Tyisha ward is the 17th most deprived neighbourhood in Wales (out of 1,909), and several others fall into the 10% most deprived communities.

⁶ Carmarthenshire County Council (2025, forthcoming), Un Sir Gâr: Carmarthenshire's Economic Vision 2025-35

- First, **culture and creativity and its links with the visitor economy**. Tourism contributed £734 million to the Carmarthenshire economy in 2024, supporting about 6,700 jobs⁷. While this is in part linked with the quality of the natural environment and landscape and a range of attractions, it is also associated with ‘sense of place’ and culture in its broadest sense, of which sport (and sporting heritage) is a key element. Across South West Wales as a whole, the *Regional Economic Delivery Plan* identifies the creation of an ‘experience economy’ as a key ‘mission’ supporting economic growth, in which the region’s sport, culture and heritage assets contribute to the visitor economy and, more broadly, to a ‘quality of life’ offer which is attractive to people seeking to live and invest in the area⁸.
- Second, **health and wellbeing**. As well as the general rise in demand for health-related services as a result of demographic change, there are some major investments in Carmarthenshire which seek to co-locate health and leisure services, such as the £200 million- plus healthcare, leisure and research facility at Pentre Awel, located just over two miles from Parc y Scarlets and which is itself one of the county’s largest single-site based investments. **There is positive collaboration underway between Scarlets and Carmarthenshire County Council to secure the full benefit from Pentre Awel** – with Scarlets using the state-of-the-art facilities for training purposes, and providing community benefits through a presence at the new centre.
- Beyond the specific economic benefits arising from individual health-related investments, there is also an increasing recognition of the economic value of participation in sport arising from its physical and mental health benefits⁹, and of rugby’s contribution to health and wellbeing in particular¹⁰.

1.11 These opportunities are explored in greater detail in relation to Scarlets later in this report.

⁷ Carmarthenshire County Council, STEAM data

⁸ South West Wales Corporate Joint Committee (2022), [Regional Economic Delivery Plan](#)

⁹ Sport England [Sheffield Hallam University/ Manchester Metropolitan University] (2024), [The social value of sport and physical activity in England](#)

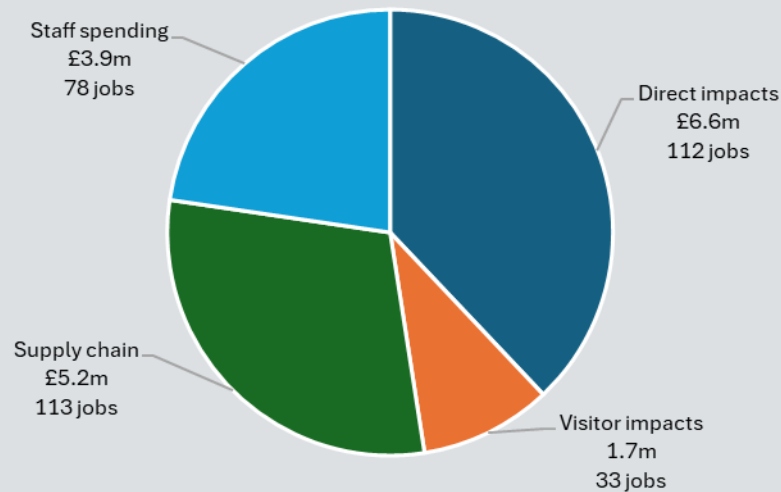
¹⁰ Griffin, S. *et al* (2020), ‘The relationships between rugby union, health and wellbeing: A scoping review’, [British Journal of Sports Medicine](#), 55:6

2. Quantified economic impacts

Summary

- In 2024/25, Scarlets generated a total economic impact of £17.3 million in gross value added. This consists of the direct impacts of the club's core activities and employment, the impacts of its supply chain, spending by people employed by Scarlets and impacts arising from visitors and supporters.
- This equates to an impact of £87 million over five years (at 2025 prices). If the club is able to steadily increase turnover to pre-pandemic levels, this could increase to around £102 million
- The club employs 112 full-time equivalent people directly (including freelance and casual workers). It also supports a further 224 jobs elsewhere in the economy – i.e., 336 jobs in total.

Summary of quantified impacts



Approach

2.1 This chapter sets out an assessment of Scarlets' economic impact, setting out:

- **Direct** impacts associated with Scarlets' core activities and employment

- Impacts arising from the **supply chain** (i.e., the goods and services that the club purchases)
- Impacts arising from **spending by people employed** by Scarlets
- Impacts arising from **visitors and supporters**.

2.2 We have drawn on a range of information to estimate economic impact. This includes data from Scarlets Rugby relating to staffing, suppliers and match and event attendance. We have supplemented this with assumptions based on official national data and on previous evaluations and assessments. This has enabled us to make a 'best estimate' at a point in time.

2.3 We have used the 2024/25 season as the year of assessment. However, we note that while match attendance has rebounded since Covid, it has not yet returned to pre-pandemic levels (a feature that is also a challenge to other clubs). To give an indication of the additional impact that could be achieved were attendance levels to ramp up further, we have therefore referred to pre-2020 data where relevant.

2.4 All monetised impacts are referred to as **gross value added (GVA)**. This is a measure of the value that an organisation or industry adds to the economy. We have also converted employment to **full-time equivalent (FTE)** jobs. Impacts are consistently quoted at three levels of geography: **Carmarthenshire, Wales** and the **UK** as a whole, and we reference other geographical units where relevant.

Direct impacts

GVA

2.5 Scarlets' total revenue in 2024/25 was £10.301 million¹¹. Operational costs were £11.24 million, with the club making an operational loss of £934k.

2.6 To estimate the direct GVA from Scarlets' activities, staff costs of £7.896 million (including player agent fees) were added to the operating loss, with depreciation then subtracted. This yields an estimate of **direct GVA of £6.568 million**.

Employment

2.7 Based on 2024/25 data, **Scarlets employ 112 people directly**, including players. This equates to **94.7 FTE jobs**. This makes Scarlets a large employer by Carmarthenshire standards: of the county's 7,755 businesses in 2024, only 35 employed more than 100 people

¹¹ 2024/25 draft accounts (unaudited)

(with only 15 of these in Llanelli)¹². The club could therefore be seen as an ‘anchor’ employer in the town.

- 2.8 52% of all employees live in Carmarthenshire**, with 78% living within the South West Wales economic region¹³, and 96% living in Wales.
- 2.9** The club employs people at a range of salary levels. **In 2024/25, the median full-time equivalent salary was £36,025**, higher than the Carmarthenshire and Wales median full-time workplace salaries of £33,310 and £34,303 respectively. The median salary does however include player salaries, which are of course much higher than the average: excluding all those earning gross pay of over £100,000 reduces the median to £30,303.
- 2.10** In addition, Scarlets contract with a further four people on a freelance basis, and employ some **244 casual workers**, mainly working on match days. These are strongly locally based: two-thirds live in Llanelli (i.e., the SA14 and SA15 postal districts) and 84% in Carmarthenshire, with most of the rest travelling short distances from the Swansea local authority area. As well as the financial return that casual workers receive, there is a wider social benefit to participation in the life of the club, which we consider further in the next chapter.
- 2.11** Bringing staff, freelancers and casual workers together, 360 people are employed by Scarlets in some way. This equates to an estimated **112 full-time equivalent roles**, and generates **total annual wages paid of £6.553 million**.

Supply chain impacts

Expenditure

- 2.12** Scarlets also have an impact through spending on goods and services. These are often referred to as ‘indirect impacts’, and include non-staff administrative costs, repairs and maintenance, purchase of supplies, marketing and publicity support, and so on. There was no major capital investment in 2024/25.
- 2.13** In 2024/25, **the club spent £4.587 million with 266 direct suppliers**. Of these, 66 were based in Carmarthenshire, and 157 in Wales. Of the remainder, all but three were within the UK. While some large suppliers are based outside of Wales (for example, utilities and telecoms providers), the local supplier footprint is likely to be larger than these headline figures suggest, since several firms based in England are likely to have branches and staff in Wales that are not captured in the data. It is also reported that Scarlets have been important in helping some smaller local businesses – especially in the food and drink sector – to become established, by enabling them to build a regular match day presence.

¹² ONS, UK Business Count. Based on private sector (including third sector) businesses. Note that the does not include some large national firms (such as supermarket chains) which will have multiple units in Carmarthenshire and employ many people in aggregate.

¹³ This is defined as Carmarthenshire, Neath Port Talbot, Pembrokeshire and Swansea.

GVA

- 2.14** To estimate the economic impact arising from the supply chain, all suppliers were allocated to their primary sector, using Standard Industrial Classification (SIC) codes. We then estimated approximate total GVA by applying the ratio of turnover to GVA for each sector in Wales, using data from the ONS Annual Business Survey.
- 2.15** Using supplier locations, GVA was allocated to the local authority districts in which the supplier is based. As noted above, this could under-count the local benefit, although we do not have data on the physical location of supplier branches and staff locally. To adjust for this, we assumed that 5% of the GVA apportioned to other Welsh districts, and 2.5% of the GVA apportioned to the rest of the UK accrues to Carmarthenshire¹⁴. Appropriate sectoral multipliers were then added to estimate the consequential further impacts of supply chain and staff expenditure.
- 2.16** This results in estimated total additional annual GVA of £1.072 million in Carmarthenshire, £3.273 million in Wales, and £5.16 million in the UK.

Employment

- 2.17** Employment is estimated using GVA per job by sector¹⁵, distributed in the same way as the GVA estimates and with employment multipliers applied. This results in an additional 27 jobs in Carmarthenshire, 75 in Wales and 113 in the UK.

Impacts derived from staff spending

- 2.18** Scarlets also contribute to economic activity through staff spending, often referred to as 'induced effects'. As noted above, the club employed 112 full-time equivalent staff, freelancers and casual workers in 2024/25, which we use as the basis for calculating the impact.

GVA

- 2.19** Average spend is derived from the ONS household expenditure survey, which provides data on annual expenditure in each UK nation and region by expenditure type. Expenditure is then scaled to actual salaries using the ratio of average earnings to expenditure in Wales¹⁶. Staff resident postcode data is used to estimate where earnings will actually be spent. We then apply a series of weightings to each type of expenditure to account for 'leakage' (for example,

¹⁴ This still yields a lower local share of impact than that quoted in some other recent economic impact studies for professional sports clubs. However, this is plausible, given Carmarthenshire's proximity to Cardiff and Swansea and the tendency of firms in professional services, media, etc. to concentrate in these larger centres to serve the regional market.

¹⁵ Derived from ONS, Regional gross value added by industry and region, and ONS, Business Register and Employment Survey.

¹⁶ We note that expenditure will not perfectly scale with earnings, given that tax take rises with earnings and the propensity to invest outside the UK will also rise. However, we use this formula to give an indicative estimate.

for some services, a high proportion of value may be captured locally; for others (such as fuel), much of the value will be captured elsewhere). Finally, we estimate GVA based on the turnover: GVA ratio for Wales, and assume national and regional GVA multipliers¹⁷.

- 2.20** This results in estimated net GVA resulting from staff spending of £1.152 million in Carmarthenshire, £3.241 million in Wales, and £3.292 million in the UK.

Employment

- 2.21** Employment is calculated from the GVA estimates in the same way as for supply chain impacts. This yields 23 additional jobs in Carmarthenshire, 65 in Wales, and 78 in the UK.

Visitor and supporter impacts

- 2.22** The final contribution to GVA and employment is derived from the activity generated by supporters and visitors who are attracted to Carmarthenshire as a result of Scarlets. We consider the impacts below in relation to matchday supporters and visitors generated by other events.

Matchday supporters

- 2.23** Total attendance across 11 home matches in the 2024/25 season was 72,712. This equated to an average attendance of 6,610, rising to over 11,000 at Ospreys derby matches.
- 2.24** An approximation of home and away attendance at each game was provided by Scarlets. Based on this, we estimate approximately 6,779 away supporters and 65,933 home supporters.
- 2.25** We assume that all away supporters of Welsh and English teams will be day visitors, with those of Scottish, Irish and other clubs split between those normally resident in England and Wales and travelling for the day and a smaller number making overnight trips. Average spend per person is estimated for domestic day and overnight trips for Wales¹⁸, and international trips for the UK¹⁹ using official data, with ticket prices subtracted. An allowance is also made for spend that 'leaks' out of Carmarthenshire to other parts of Wales and the UK, which rises for international visitors.
- 2.26** Most home supporters will be local, although some will travel from outside the area. We assume that 20% will travel from outside Carmarthenshire, and that these will be day visitors, mostly from other parts of Wales. In addition, some supporters will be accompanied by

¹⁷ In this case, these are based on the ready reckoners in the HCA *Additionality Guide* (2014).

¹⁸ Welsh Government (2025), Domestic GB tourism statistics. Average domestic visitor spend per person per day trip is estimated at £41. Average domestic overnight leisure trip is estimated at £258.

¹⁹ ONS, Estimates of overseas visits and spending. Average overseas trip is estimated at £758.

friends and family. Indicatively, we assume that 25% of supporters will be accompanied by someone not watching the match.

- 2.27** Spend is converted to GVA, yielding a total economic contribution from matchday supporters of £1.310 million in Carmarthenshire, £1.443 million in Wales and £1.576 million in the UK. Divided by average GVA per filled job gives 31 jobs supported by visitor activity.

Other events and activities

- 2.28** In addition to rugby matches, Parc y Scarlets hosts numerous other events, including other sports activities and non-sport activities such as conferences and exhibitions.

- 2.29** Analysis of data provided by Scarlets indicates that non-matchday events have around 19,000 users per year. The great majority of these are likely to be local residents, although there will be some visitors from further afield, to events such as the Hyrox fitness competition and business events catering to a regional audience. Estimating external attendance for each event line suggests around 3,500 visitors per annum, with an assumed additional spend of £41 per capita, as used earlier.

- 2.30** Accounting for leakage and adjusting to GVA indicates around £84k net GVA to Carmarthenshire.

Bringing it together

- 2.31** Combined, the total economic impact of Scarlets is estimated at around **£17.3 million**, supporting **336 jobs**. This is broken down in the table below (note that all impacts are cumulative – i.e., the Wales total includes jobs and GVA in Carmarthenshire, and the UK total includes the figures for Wales):

Table 2-1: Summary of economic impacts

	Carmarthenshire	Wales	UK
Annual GVA (£m)			
Direct impact	6.568	6.568	6.568
Supply chain impact	1.072	3.273	5.160
Staff spending impact	1.152	3.241	3.922
Visitors and supporters impact	1.394	1.527	1.660
Total	10.186	14.609	17.310
Jobs			
Direct impact	112	112	112

	Carmarthenshire	Wales	UK
Supply chain impact	27	75	113
Staff spending impact	23	65	78
Visitors and supporters impact	28	30	33
Total	190	282	336

Source: SQW. Note that totals may not sum due to rounding

Retained value

2.32 In addition to the impacts outlined above, Scarlets is important in retaining economic value in Carmarthenshire which might otherwise be lost to the area. This is especially relevant to the impact generated by visitors and supporters, where in the absence of professional rugby locally, some spectators would otherwise travel out of the county. It is also likely that some locally-generated non-match activity (local business events, etc.) would also be lost to the area, given the capacity of Parc y Scarlets and its unique character. Although this 'counterfactual' is not included in the estimates of economic impact, it is potentially significant.

Future potential

2.33 The estimates in Table 2-1 are all based on 2024/25 figures. However, the past few years have been challenging for Scarlets, and these challenges are reflected in the 2024/25 outturn: the Covid-19 pandemic had a major and long-term negative impact financially, and while attendance has rebounded, matchday numbers remain below pre-pandemic levels. For example, the accounts for 2018/19 report average matchday attendance of 8,000, over 20% higher than in the 2024/25 season. Pre-pandemic, Parc y Scarlets achieved capacity attendance in 2018, when Scarlets played La Rochelle in the European Champions Cup Quarter Final. Turnover was also much higher in 2018/19: about 40% higher in nominal terms, but almost 80% higher in real terms²⁰. In that year, the club made a net profit of £167k.

2.34 Returning to or exceeding these numbers presents a challenge, which is shared with other clubs. But it also illustrates potential for growth. To provide an indication of the economic impact of this, we assume a return to 2018/19 turnover levels over five years from a 2024/25 starting point, with equivalent growth in attendance, with more incremental growth in staffing and supplier spend. Indicatively, this illustrates potential for an annual economic impact of around £24 million (at 2025 prices), with a cumulative five-year impact of just over £100 million.

²⁰ Real terms growth calculated using Bank of England inflation calculator.

Table 2-2: Potential future impacts (GVA, £m, 2025 prices)

	'Steady state'	'Growth'
Annual	17.310	24.402 ²¹
Five years (2024/25 – 2028/29)	86.549	101.726

Source: SQW

Business relationships

2.35 In addition to contributions to employment and GVA, **Scarlets are an important part of the Carmarthenshire business network**. Parc y Scarlets offers a major and high-profile venue for business events and conferencing, hosting in 2024/25 the Carmarthenshire Business Awards and Swansea Bay Business Club's St David's Day Dinner, as well as some 14 local business conferences and training sessions. Castell Howell, a leading Carmarthenshire employer and a Scarlets sponsor, used Parc y Scarlets for its major trade foodservice show in February 2025.

2.36 The club is a major source of **sponsorship** opportunities. In 2024/25, Scarlets had 101 sponsorship partners, generating revenue of £1.484 million. Analysis by the club indicates that 70% of sponsors are based in the Scarlets region, with a further 11% based elsewhere in Wales. Key regionally-based sponsors are highlighted below:

Table 2-3: Key regionally-based sponsors

Sponsor	Description
Gavin Griffiths Group	Family-owned waste management, recycling and aggregates company, based in Swansea and with a significant presence in Carmarthenshire. Scarlets' largest sponsor for the 2025/26 season.
Owens Group	One of the UK's largest family-owned transport, warehousing and distribution companies, based in Llanelli.
Castell Howell	Major food service company and one of Wales' largest private sector employers, based at Cross Hands and with depots across Wales and England.
Dyfed Steels	Largest independent steel stockholder and processor in Wales and the West of England, based in Llanelli and with several branches across Wales and England.
Cadog Homecare	Domiciliary care provider, based in Ammanford and operating across South West and Mid Wales.
CK Foodstores	Regional convenience store chain, based in Llanelli and with a presence across South West Wales.

²¹ By 2028/29, assuming ramping up over the period.

Sponsor	Description
Cawdor	Car dealership, headquartered in Newcastle Emlyn and with outlets across Carmarthenshire and Ceredigion.

Source: SQW

2.37 In a region with a relatively small business base and few large employers, Scarlets provide an important opportunity to ‘showcase’ the local business community and the role of some of the region’s nationally-leading firms. This is also relevant to the economic strategies for Carmarthenshire and South West Wales, which emphasise the value of growing the ‘indigenous’ business base and building resilience by strengthening company links with local supply chains and communities²².

2.38 Sponsorship delivers significant value to sponsoring companies. Analysis on behalf of Scarlets found that the broadcast value of the brand visibility derived from sponsorship of the North Stand is worth £197k per season, with front-of-shirt brand visibility having a broadcast value of £283k and a social media value of around £136k²³. The club has a target to raise sponsorship revenue to £1.75 million in 2025/26²⁴. It is worth noting in this context that broadcast audiences for Scarlets have grown rapidly: the club saw the fastest year-on-year growth in broadcast audiences of any United Rugby Championship club in 2024/25²⁵.

²² Carmarthenshire County Council (2025, forthcoming), *Un Sir Gâr: Carmarthenshire’s Economic Vision 2025-35*; South West Wales CJC (2022), *Regional Economic Delivery Plan*

²³ Blinkfire for Scarlets, 2025

²⁴ Scarlets (2025), Sponsorship strategy and action plan

²⁵ United Rugby Championship (2025), *End of Season Report 2024/24*

3. Social and community impacts

Summary

- Scarlets make a major contribution to the local community, including through the Scarlets Community Foundation, the club's charitable arm, supporting the delivery of the Wellbeing of Future Generations Act.
- This includes a range of activities supporting involvement in sport for all ages and abilities, including activity delivered in partnership with the local authorities to support access to sport for children in disadvantaged communities. There is also an extensive programme of activity to build inclusive participation.
- Scarlets is Wales' only professional club located in an area where the majority of people have an understanding of Welsh. It is an important 'anchor institution' and has a key role in local culture and identity.
- Scarlets work in partnership with several charities. The club makes an important contribution to raising awareness, especially of smaller local charities.

Introduction

- 3.1** Scarlets make a major contribution to the local community. For many people, this will be more important than the club's economic impact: Llanelli, and the wider region, have a long and distinguished rugby heritage, and Scarlets' presence is an embedded part of local culture and identity. Beyond that, the inherent value of sport and its impact on physical and mental health, wider community belonging, and so on are at least as significant as the quantifiable impact on GVA.

3.2 This chapter considers these wider community and social impacts. As a framework for this, we use the Well-being of Future Generations (Wales) Act, which exists to improve the social, economic, environmental and cultural wellbeing of Wales²⁶. The Act identifies seven 'wellbeing goals', illustrated in Figure 3-1. In this chapter, we describe Scarlets' impact in relation to each of the goals (other than the goal of 'a prosperous Wales', which is set out in the previous chapter). This also draws on a major study carried out in 2021/22 by Sport Wales to assess the social impact of sport and active recreation in Wales²⁷.

Figure 3-1: The seven wellbeing goals



Source: Welsh Government

A healthier Wales

3.3 There is a substantial body of evidence relating to the health benefits of participation in sport²⁸. These include:

- The **direct health benefits of active participation**, including the benefits to mental health that physical activity provide. Analysis by the University of Edinburgh concludes that "all forms of rugby can be linked to a wide range of health and wellbeing benefits"²⁹, and separate research demonstrates the long-term benefits of childhood participation in rugby as engagement in physical activity is carried through into later life³⁰.
- **Subjective wellbeing benefits**, including feelings of belonging and increased positivity and self-esteem, supporting mental health outcomes. While the social return on investment study was primarily concerned with direct participation in sports activity, many of these benefits will also apply to non-direct participation, such as attending matches.

²⁶ Welsh Government (2015), [Well-being of Future Generations \(Wales\) Act 2015](#)

²⁷ Sport Wales [Sheffield Hallam University] (2022), [Social Return on Investment of Sport in Wales](#). This found that every pound invested in sport delivers £4.44 of social value, based on physical and mental health benefits, the value of volunteering, etc.

²⁸ Ibid.

²⁹ Griffin, S. *et al* (2020), 'The relationships between rugby union, health and wellbeing: A scoping review', [British Journal of Sports Medicine](#), 55:6

³⁰ NHS Health Research Authority (2019), [The Rugby Health and Wellbeing Study](#)

3.4 In 2024/25, Scarlets supported several activities promoting direct physical participation in rugby for children, young people and adults, as well as coaching and development opportunities. These included:

- Within **primary schools**, delivery of **786 skill sessions** with a total attendance of 15,940³¹; and **21 primary school rugby festivals** with a total attendance of 3,200. These are widely distributed around the Scarlets region, in Carmarthenshire, Ceredigion and Pembrokeshire. In addition, seven girls-only rugby sessions attracted attendance of 121, and a beach festival in Tenby attracted a further 200.
- A variety of **match day activities** (half-time tag, primary school competitions, rugby festivals for under 9s, under 11s, Girls Hub Festival, walking rugby, etc.), attracting attendance of 2,690.
- 22 **rugby camps** with attendance of 385. These included 17 'Fit Fed Fun' camps (see below) and included two for young people with additional learning needs.
- 37 **mixed ability rugby** sessions (men's, women's and youth), delivered in conjunction with Llanelli Warriors and Pembrokeshire Vikings and attracting attendance of 209.
- 61 individual **wheelchair rugby** sessions, in addition to a programme of weekly sessions, with total attendance of 1,925.
- 35 **representative rugby** sessions (U16/U15/U11), with total attendance of 390.
- **Open training sessions** in Carmarthenshire, Ceredigion and Pembrokeshire, with total attendance of 1,588.

3.5 These demonstrate an extensive programme to encourage direct participation in sport in the community, delivered in partnership with schools, colleges and local rugby clubs. In addition, the club makes an important contribution to mental health and broader wellbeing. For example, since 2023, Scarlets have worked in partnership with **Sporting Memories**, a UK-wide charity which runs community-based clubs to help older people, especially those who are living with dementia, depression or who are otherwise isolated, to build connections with others³². The Sporting Memories club in Llanelli meets at Parc y Scarlets: in 2024/25, it met 32 times, with around 25 participants at each meeting.

3.6 These activities contribute to the Welsh Government's strategic health objectives. The percentage of people participating in sporting activities three or more times a week is included as one of the 50 National Wellbeing Indicators that support the delivery of the Wellbeing of Future Generations Act³³. In the context of an ageing population and recognition

³¹ 'Attendance' mean the total number of people participating in each session. These are not necessarily unique individuals (some may have participated multiple times in different sessions).

³² See <https://www.sportingmemories.uk/>.

³³ Welsh Government, [National Wellbeing Indicators](#) (Indicator 38)

of the impact of behavioural factors in preventable ill-health, Public Health Wales also has a target to increase the proportion of the population who are active³⁴. The Welsh Government's new mental health and wellbeing strategy refers to "the building blocks of wider society that support good mental health", including sports clubs based within the community³⁵.

A more equal Wales

- 3.7** Much of Scarlets' community activity supports more equal access to sports and leisure opportunities and the health and social benefits that result. While this is partially embedded within the activities highlighted above, other initiatives include regular **Inclusive Community Clubs** open to young people aged 6-16 with a range of disabilities, offering the chance for families and friends to play non-contact rugby. In 2024/25, Scarlets supported 76 Inclusive Community Club sessions in Ammanford, Llanelli and Haverfordwest, and a further 10 delivered in conjunction with Carmarthenshire County Council's Pupil Referral Unit. Access to rugby participation by people with disabilities is further supported by the popular wheelchair rugby and mixed-ability programmes referenced above, and by a **Deaf Community Event**, which attracted 57 participants. Three Disability Rugby Camps were also held at Parc y Scarlets, Aberystwyth University and Pembrokeshire College. These activities in turn contribute to the WRU's Disability Rugby Strategy.
- 3.8** Scarlets also play an important role in supporting access to sport in disadvantaged communities. In 2024/25, the club ran 17 **Fit, Fed Fun** camps for primary school-aged children (two for children with additional learning needs), delivered in collaboration with Carmarthenshire County Council's Actif leisure team and the other local authorities in Ceredigion and Pembrokeshire. Focused on areas of deprivation (and distributed widely across the region), the camps offer children breakfast and lunch alongside multi-skilled sports activities, with a total attendance of 300.

A Wales of cohesive communities

- 3.9** Alongside this, Scarlets' community programme seeks to ensure that rugby is at the heart of all communities in the region. In 2024/25, six sessions were delivered with for children from the Syrian and Lebanese communities in Llanelli (with attendance of 66), in addition to six sessions focused on homeless people (delivered in conjunction with The Wallich, a homelessness charity, in Llanelli) and the traveller community. Scarlets also participated in regular armed forces day events with schools and colleges, and in Llanelli Pride.

³⁴ i.e., meeting the guidance of 150 minutes' moderate to vigorous activity per week. Public Health Wales (2023), [Working together for a healthier Wales: Our long-term strategy 2023-35](#)

³⁵ Welsh Government (2025), [The mental health and wellbeing strategy 2025-35](#)

Promoting inclusion and opportunities for everyone

"My eldest son is severely autistic, so the chance to work with pupils with a range of physical abilities as well as social, emotional and behaviour needs is close to my heart. When the Scarlets created a dedicated role in its community team to focus on inclusion in the sport, I jumped at the chance to bring all of this together."

"We have three busy Inclusive Community Clubs, with the biggest numbers and geographical spread we've ever had in the history of this club. We run sessions to give young people with disabilities aged six to 16 the opportunity to play rugby and other PE games which we make as sensory and fun as possible."

"It's about providing experiences that give those with disabilities and their siblings the chance to have fun, engage with games and activities and give parity and access to sport in the same way as others. It's also really great for parents as it creates a hub and social network for families to come together. It's about bringing it all together. For example, when you see youngsters of all abilities playing wheelchair rugby against their friends and everyone's involved it really is brilliant to witness how thrilled they are."

The social side is really important, we had one young guy who at 19 didn't want to engage with college and being part of Llanelli Warriors was his entire social network, training on a Thursday and playing on a Saturday was a key focal point for getting him out of the house and engaging with others."

"We have lots of projects in the pipeline – it's going to be a very busy year! We are running sessions with Syrian refugees in association with Llanelli Town Council and had really good engagement so we'll look to set up our own Scarlets mixed nationality sessions for those who have been forcibly displaced from their home countries."

"We're working with the Gateway Resort on a programme with the travelling community in partnership with Carmarthenshire Council to provide open rugby sessions – there's been a lot of energy around these."

"Plus we're working on sessions with EYST at the Mosque in Haverfordwest, providing Rugby Leaders training and equipment to run rugby programmes with the aim of linking players into rugby clubs. We have a presence at Llanelli Pride and will look to set up another rugby club for IGR players in addition to links with the Swansea Vikings."

"We're also working with local authorities on setting up a homeless rugby programme and a special programme for schools with youngsters with behavioural issues."

Ollie West, Scarlets Inclusion Officer

A Wales of vibrant culture and thriving Welsh language

3.21 As already noted, Scarlets – and rugby more broadly – are a core part of regional culture and identity, and cultural benefit and contribution to ‘sense of place’ and community solidarity are key intangible and unquantifiable impacts.

3.22 Scarlets also have an important role at the centre of the Welsh-speaking heartland. The club is the only one of Wales’ four professional clubs to be based in a county in which most people have some knowledge of Welsh³⁶, and the association between vibrant local community activity (including sports activities), anchor institutions that communicate through the medium of Welsh, and population retention in Welsh-speaking communities is well recognised³⁷. More broadly, rugby makes a substantial contribution to Welsh-language broadcast media consumption: in the first half of 2025, derby matches involving Scarlets were all the top programmes viewed on S4C in the week:

Table 3-1: S4C viewing figures for Scarlets derby matches, Jan-May 2025

Date	Match	Viewing	Rank in week
5 Jan	Scarlets - Dragons	70,000	1
16 Feb	Scarlets - Ospreys	79,000 ³⁸	1
20 Apr	Dragons – Scarlets	44,000	1

Source: S4C viewing figures

3.23 Scarlets have also supported efforts to enable and promote the use of the Welsh language through sport, including by contributing to the recent development of bilingual e-learning sports resources brought forward by Coleg Cymraeg Cenedlaethol³⁹.

A resilient Wales

3.24 This wellbeing goal refers to environmental sustainability. Parc y Scarlets has solar panels installed on the roof of the stadium and indoor training facility, and extracts water for pitch watering from bore hole technology. Recently, the club has invested in further sustainable grounds maintenance solutions⁴⁰, and Parc y Scarlets offers electric vehicle charging points and was the first stadium in Wales to switch away from disposable plastic cups. As noted earlier, Scarlets’ leading sponsor is a waste management and environmental technologies company, and through Parc y Scarlets’ role as a major venue serving the local hospitality market, helps to reduce travel miles to Swansea and other larger centres.

³⁶ 53.3% of Carmarthenshire residents had ‘some knowledge of Welsh’ according to the 2021 census, compared with 25.2% across Wales as a whole.

³⁷ See, for example the evidence presented as part of the ARFOR programme.

³⁸ Including repeat

³⁹ See [Scarlets help launch new further education resource at Eisteddfod](#)

⁴⁰ See [Scarlets partnership with a water services provider](#)

A globally responsible Wales

3.25 Finally, Scarlets are an international organisation, hosting teams from overseas at Parc y Scarlets and representing the region and Wales abroad. The economic value of this – in terms of visitor spend - is already factored into the economic impact analysis, but there are broader gains for Wales from international links. The Welsh Government's International Strategy specifically references sport as a route through which Wales, and Welsh goods and services, become better-known⁴¹, and it is likely that Scarlets raise wider awareness of Carmarthenshire and South West Wales than would otherwise be the case.

Charitable links

3.26 Much of Scarlets' community activity is delivered via Scarlets Community Foundation, a charity established by the club which received funding from Scarlets, as well as having the ability to secure other charitable donations. In addition, the club engaged with ten charities through match day activities. As well as several UK and Wales-based charities, these included four Carmarthenshire-based charities: Angor (which offers cancer support), Links (a Llanelli-based mental health charity), the Wish Fund (a children's charity supported by Hywel Dda University Health Board) and Foster Wales Carmarthenshire. It is likely that Scarlets plays an important role in raising the profile of the charities it supports, especially smaller, locally-based organisations.

⁴¹ Welsh Government (2020), [International Strategy for Wales](#)



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