



Business Plan

Strategic growth plan for Llysfasi

VERSION CONTROL

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1. INTRODUCTION

1.1 Background

- 1.1.1 Formerly an independent centre for agricultural training in Pentrecelyn, Ruthin, Denbighshire, Llysfasi College became part of Coleg Cambria when Deeside College merged with Yale College, Wrexham in August 2013.
- 1.1.2 Llysfasi sits within an Area of Outstanding Natural Beauty in the Vale of Clwyd, just outside Ruthin.
- 1.1.3 The manor was built during the late 16th century and the original name, Llys Llannerch, was changed to Llys Masi (Massey's Court) at that time.
- 1.1.4 The estate was owned by the Myddelton family of Chirk and their descendants from 1633 to 1909, when it was purchased by Charles William Sandles of Cheshire. He had plans to establish it as an agricultural college, but in 1911, due to financial difficulties, he had to sell it to a cotton broker, R. W. Brown from Birkenhead. Brown continued to develop the farm as an agricultural college until 1919, when it was purchased by Denbighshire County Council.
- 1.1.5 The first principal was Isaac Jones, who was appointed in 1919 and took up office on St David's Day 1920. He was followed by D. S. Edwards (1943–1967) and Maldwyn Fisher (1967–1983). The last principal of the college as an independent establishment was Fred Cunningham (1983–2010) before it became part of the Deeside College Group on 1 August 2010.
- 1.1.6 Llysfasi has now moved from being an agriculture focused college to a specialist in land-based skills, with focus on 4 key areas –
 - 1.1.6.1 Agriculture
 - 1.1.6.2 Land-based Machinery
 - 1.1.6.3 Forestry and Arboriculture
 - 1.1.6.4 Countryside Management
- 1.1.7 In 2020 the college built a community hub and in 2023 a fully sustainable learning zone development commenced.
- 1.1.8 The effects of covid and changes in Coleg Cambria's delivery model, saw Llysfasi student numbers reduced down to 150 in one year. However, new commercial partnerships with AGCO and Kubota have seen numbers rise again to 300 for the start of the 2024/2025 academic year and numbers are continually rising.
- 1.1.9 Originally the courses delivered at Llysfasi were not focused on full-time delivery to include residential requirement for all students. The new commercial partnerships have seen this model change and now 5 cohorts of students are staying on site from September to June on three year programmes. The current accommodation provision is not meeting these requirements; in 2023/2024, 80 students required accommodation at peak times, with only facilities for 44 currently available, meant "BunkaBin" accommodation had to be provided (portable accommodation), as well as accommodating students in hostels as far away as Llandudno, all of which is at a cost to the college and results in the current courses making a financial loss. AGCO have threatened to pull out of the contract if their students cannot be accommodated in permanent accommodation on site, they already use 3 other colleges across the UK.
- 1.1.10 This business plan is written to support the future development of Llysfasi to make it the leading land based, Forestry and Arboriculture college in the country, with the first steps to build a new 50 bed accommodation block on site.

1.2 Location & Wider Context

- 1.2.1 Llysfasi is one of six sites which makes up Coleg Cambria. Set on the A525, 4 miles from the centre of Ruthin and 14 miles from Wrexham, it borders the Clwydian Range and Dee Valley Area of Outstanding Natural Beauty.

- 1.2.2 The site encompasses in the region of 970 acres, is a huge agricultural site, which includes parts of the AONB.
- 1.2.3 The A494 and A483 are both easily accessible for students arriving from areas across Mid and South Wales; Bangor is 50 miles away, with the A55 and A5 both making North Wales simple commuting distance.
- 1.2.4 Being only 25 miles from Chester and 40 miles from Crewe, the campus is reachable to two major railway stations and the M6, and then anywhere across the country.
- 1.2.5 Ruthin is a market town, in North Wales, with a number of restaurants, pubs and take aways to attract the students of all ages. From Wern Fechan Fish & Chip Shop, where the students can order their meal online or Panda Garden Restaurant & Takeaway which will deliver to those who cannot drive. Just Eat works with a number of places within the Ruthin postcode who will deliver to the students in Llysfasi.
- 1.2.6 As students drive to Ruthin, they pass through the small village of Llanfair Dyffryn Clwyd which has a small local pub, The White Horse.

2. STRATEGIC CONTEXT

2.1 National Context Education

- 2.1.1 The 2023 Policy and Strategy “Our National Mission: high standards and aspirations for all” is a roadmap that’s sets out how existing education policies and commitments relates to one another, written by the Welsh Government.
- 2.1.2 This paper has 6 objectives, key to the development at Llysfasi is objective 1 - *Learning for life so that everyone in Wales learns, and continues to learn.....* How this will be achieved is “..through collaboration across providers and with industry and employers.” It is partnership and collaboration with industry that has enabled Llysfasi to grow so fast and require the increase in accommodation to make the courses accessible to all.

2.2 National Context Investment

- 2.2.1 The “Future Wales: The National Plan 2040” is the national spatial plan, written to set the direction for investment in infrastructure and development of the greater good of Wales and its people. Policy 5 – “Supporting the rural economy” identifies the lack of employment opportunity is a key reason behind depopulation, particularly in the younger workforce. It goes on to state “rural areas should develop a broad economic base which supports a strong foundational sector, agricultural and forestry industry, innovative and emerging technology based enterprise, start-ups and micro businesses.” As a business in its own right, the Llysfasi campus employs 50 (mainly local) staff a mix of administration, academic and farm & land maintenance; this new growth will see these numbers increase. The apprenticeship and new commercial courses being developed with industry will also support this policy, by broadening the skills of young people living in rural communities across Wales while making them employment ready.
- 2.2.2 Policy 5 also identifies the need for diversification to help maintain a sustainable and resilient agricultural and forestry sector. Policies and criteria to enable appropriate diversification should be set out in Strategic and Local Development Plans. One of the key growth areas at Llysfasi is Forestry and Arboriculture
- 2.2.3 Policy 12 Talks about regional connectivity and the need to reduce private car travel. The reason for the accommodation development at Llysfasi is to reduce the need for students to drive each day to and from the campus. The residential courses are run over 10 weeks in cohorts of 3 week blocks over the academic year, for 2 -3 years. Currently a large percentage of the students are staying in accommodation as far away as Llandudno, resulting in a daily 70 mile commute. The new accommodation block will stop the daily need for private car use. Of the full-time learners 15% of them stay onsite all academic year. As recognised in policy 12, Coleg Cambria have an active travel scheme developed to reduce the need for private car use once students are onsite, there are a number of campus mini buses on site, the college wardens, who remain on site during term time, drive students into Ruthin and pick them up in groups, in their free time. The college have recently invested in a purpose built bus stop for the X51 to stop and pick up, which runs between Wrexham and Denbigh. This provision is not just for college students but locals can use the provision. The bus stop also provides a safe space for local secondary school children to catch their school bus, with car parking available for parents during drop off and pick up.
- 2.2.4 Policy 21 Regional Growth Area – North Wales Coastal Settlements mentions “The universities in Bangor and Wrexham are an important presence in the region, providing further education, undertaking research and supporting innovation, providing employment, attracting students, and supporting the local businesses and communities around them. Strategic and Local Development Plans should consider their role in the region and how they can play a bigger role in supporting the regional economy, innovation and their communities.” Supporting the potential growth at Llysfasi is in direct response to this policy.

- 2.2.5 The AONB has been taken into consideration in the design of the new build. In Policy 22 Green Belts in the North it identifies the need for the AONB to be protected for the enjoyment of future generations and help to provide economic benefits for the regions communities. The planned development is within the AONB and concessions have been made to ensure the building does not have a visual impact on those visiting areas of the AONB open to the public. The new build has also been moved away from the boundary line to reduce visual impact, situated on the footprint of a building that will be demolished for this new build.

2.3 Regional Context Skills

- 2.3.1 The Regional Skills Plan for North Wales identifies the sectors of strong growth includes Food and Farming.
- 2.3.2 The Plan recognises the need to link employers with education and working collaboratively. It states that encouragement should be made to promote activities that are taking place where the engagement is working well.
- 2.3.3 Without the accommodation block it is likely Llysfasi will lose at least 50% of the commercial partnership agreement.

2.4 Local Context

- 2.4.1 Llysfasi is located in Denbighshire. The Denbighshire Corporate Plan 2022 to 2027 identifies 6 areas of focus, key to the development at Llysfasi are –
- 2.4.1.1 Number 2 A prosperous Denbighshire; Developing a plan to grow Denbighshire’s business in the future.
- 2.4.1.2 Number 4 A learning and Growing Denbighshire; Making sure everyone has fair opportunities to learn; and Providing quality buildings and facilities that support learning and thriving communities.

3. IMPACT

3.1 Social Value of FE

- 3.1.1 Demonstrating the Social Value of FE colleges in Wales report shows that colleges act as anchor organisations, shaping their local and regional economies. Their focus on skills development, partnerships with businesses, and apprenticeship programmes illustrates their commitment to cultivating a skilled workforce for the future.
- 3.1.2 Upon the completion of the first cohort of AGCO apprentices at Llysfasi, Richard Charles, AGCO Manager for Aftersales Customer Care and training is quoted as saying –
“We are delighted to congratulate the first cohort of students to have graduated from Coleg Cambria Llysfasi,” he said. “Our partnership offers a dedicated training programme giving candidates an underpinning knowledge of agricultural engineering principles and techniques leading up to dedicated manufacturer training on the cutting-edge technology AGCO products offer to the industry. This gives the successful candidates a lead into a truly exciting job with their respective dealers, earning while they are learning and offering the potential for a lifelong career. Together with Llysfasi we are striving to give our students and dealers the best possible apprenticeships in our industry – this result is testament to the quality of the training given.”

3.2 Economic Value of FE

- 3.2.1 The average salary of workers aged 18-21 in Wales is £11,251 based on ONS data and Cebr analysis. This increases to £17,573 in cases someone enrolls on an apprenticeship.
- 3.2.2 The average salary of workers aged 22-29 is £22,779 (this the base for those aged 25+). For apprentices aged 25 and above, the average salary is £22,800.
- 3.2.3 The accumulated impact of former FE colleges in Wales learners who are currently employed in the national workforce amounts to £3.5 billion in added income to the economy of Wales. Altogether, the economic impact of FE colleges in Wales to the local business community in Wales is £4 billion each year.
- 3.2.4 The loss of one of the lead apprenticeship programmes to Llysfasi will have a huge impact on the college and the economy. Many of the students who attend will have to travel to England to continue their onsite studies which could be unjustifiable.
- 3.2.5 The Colleges in Wales Economic Summary of FE in Wales 2014/2015 study demonstrate that FE colleges in Wales create value from multiple perspectives. The colleges address the needs of employers by providing them with staff development opportunities and supplying the workforce with qualified, trained workers. Local businesses benefit from the patronage of FE colleges in Wales and the expenditure of college staff and learners.
- 3.2.6 According to the report *“learners as a whole paid a total of £66.9 million to cover the cost of tuition fees and books and supplies at FE colleges in Wales in 2014-15. All learners also forwent £732.7 million in earnings that they would have generated had they been working instead of learning.*
- 3.2.7 *In return for the monies that learners invest in FE colleges in Wales (i.e., in the form of tuition fees and forgone earnings), they will receive a present value of £5.5 billion in increased earnings over their working lives.*
- 3.2.8 *Every £1 that learners pay for their education at FE colleges in Wales yields £6.90 in higher future wages. This translates to a 20.8% annual rate of return on their investment.”*
- 3.2.9 Interesting is the impact of staff in FE colleges in Wales. In 2014/15 *“FE colleges in Wales employed 8,115 full-time, part-time, and agency faculty and staff in 2014-15. Staff costs amounted to £305.2 million, much of which was spent in Wales to purchase groceries, clothing, and other household goods and services.*

- 3.2.10 The colleges are buyers of goods and services and spent £163.1 million to support their operations in 2014- 15. FE colleges in Wales expenditure further benefited many local suppliers in Wales.
- 3.2.11 The net impact of staff and college expenditure comes to approximately £455.5 million in added income in the economy of Wales each year."
- 3.2.12 "Learners at FE colleges in Wales who relocate to Wales from outside of the area spend money at local shops to buy books and supplies, purchase groceries, rent accommodation, pay for transport, attend sporting events, and so on.
- 3.2.13 The expenditure of the colleges' learners from outside Wales annually adds approximately £5.1 million in income to the economy of Wales."
- 3.2.14 Fig 1 & 2 below highlight the key figures nationally.
- 3.2.15 Therefore, the result of not being able to provide further permanent accommodation at Llysfasi will mean the guaranteed loss of one of the commercial partners (maybe both), the loss of over 150 students, which will mean the additional jobs will not be created and there will be reduced spend in the local area.

Fig1

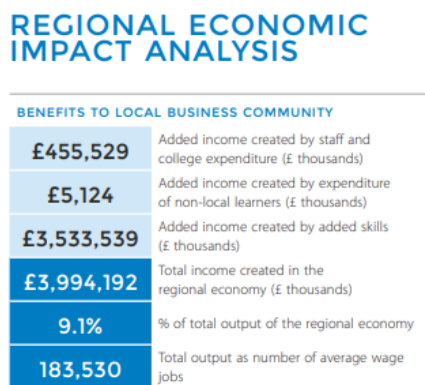
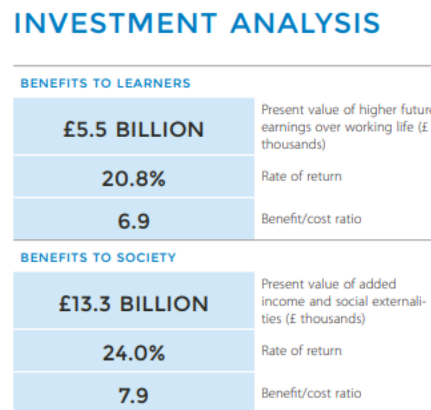


Fig2



3.3 The Economic Impact of the Student

- 3.3.1 According to **UK student cost of living statistics 2023** by confused.com - Statistics from NatWest reveal that Cardiff students typically have the highest average student income per month during term-time in the UK. At £3,328, this is marginally more than those at Bournemouth but around £435 more than the average UK student.
- 3.3.2 In total, an average student spends £119 a month on different activities in 2023, compared to £290 in 2022.
- 3.3.3 In 2023, around 44% of a typical student's expenditure on activities was for going out, with just over a quarter (26%) on pursuing hobbies.
- 3.3.4 When broken down by category of spending, supermarket shopping forms the largest percentage of student expenditure in 2023. At almost £110 a month on average, a typical UK student spends almost a quarter (24%) of their budget on food, toiletries, and household items.
- 3.3.5 This is followed by eating out and transport costs for visiting home in term time (both 8% of total monthly spend).
- 3.3.6 Fig3 below shows the average monthly spend on alcohol for UK students

Fig3

University | **Average monthly alcohol spend (£)**
 = £1



3.3.7 And they spend an average of £28.80 on takeaways



4. THE BUSINESS

4.1 Vision

- 4.1.1 For Llysfasi to continue its growth of land based, forestry and countryside management provision to become the platform for the industry

4.2 Objectives

- 4.2.1 To increase student numbers from 300 to 400 by 2029
- 4.2.2 To increase the accommodation space available from 44 single occupancy rooms to 162 environmentally sustainable modern rooms in 4 years.
- 4.2.3 Ensure Llysfasi retains the current commercial partners for the next 10 years and attracts the interest of new international partners.

4.3 Description of the business

- 4.3.1 Llysfasi is one of 6 campuses under the Coleg Cambria umbrella. Coleg Cambria was created in 2013 and has rapidly become a leading UK education provider. It provides learning at GCSE level, A-levels, and vocational qualifications, both in further education and high education offering part-time, full-time courses and apprenticeships. The Coleg is one of the largest in the UK with approximately 6000 full-time students and 20000 part-time learners.
- 4.3.2 This business plan is focused on Llysfasi campus, located 14.5 miles from the main site in the centre of Wrexham.
- 4.3.3 Llysfasi has been the site of an agricultural college for over 100 years, run by Denbighshire County Council from 1919 until it was purchased by Deeside College in 2010.
- 4.3.4 Since that time Coleg Cambria (Deeside college merged with Yale College in 2013 to form Coleg Cambria) has invested over £11million to develop the site including a new rural education community hub which opened in 2020 and a carbon-neutral education complex which opened in September 2024 containing classrooms, a soil laboratory, meeting spaces, a coffee shop, well-being hub for students, climbing wall and much more.
- 4.3.5 The college was originally focused on agriculture, with farming being one of the key syllabuses run on site. However, the animal based elements of the college have now moved to the Northop Campus leaving Llysfasi to focus on land-based education.
- 4.3.6 Students range from 16-19year olds studying FE level qualification; with HE education being provided to students upto 25+ years.
- 4.3.7 When the animal care element of the college was moved to Northop the number of students greatly diminished on site, it has taken 5 years to bring it back up to the 300 registered students who will start the 2024/2025 academic year in September. An 80% increase in student numbers in one year.
- 4.3.8 The increase in numbers has been attributed to the commercial partnership between the college and two organisations; AGCO an American agricultural machinery manufacturer; Kubota a Japanese Agricultural machinery company. Both organisations have created academy programme with Llysfasi to provide training and development for their employees.
- 4.3.9 The original make up of students at Llysfasi were day students with very little need for accommodation (in 2023 15% used the accommodation). The Accommodation that is on site, is old and tired, the buildings they are housed in are dated and lack modern heating/insulation and technology. The new programmes developed with the commercial partners require students to remain on site for 10 blocks of 3 weeks, per year, across 3 academic years, creating at times the necessity of 80+ rooms required.
- 4.3.10 Currently Llysfasi can accommodate a maximum of 42 rooms; to cover the additional need "BunkaBin" have been hired in for the 16-19 year old students and accommodation has been

sought in B&Bs or hotels as far away as Llandudno for older students. This is not ideal as it is cost prohibited and one of the commercial partners have threatened to pull the project if permanent onsite accommodation is not sourced for their students in the next academic year.

- 4.3.11 In academic year 2023/2024 there were 36 full-time learners requiring accommodation and 70 block learners. For 2024/2025 the full-time learners have remained the same and the block learners have increased to 80.

4.4 Company Ownership/Legal Entity

- 4.4.1 The Corporation was established under the Further and Higher Education Act 1992 for the purpose of conducting Coleg Cambria.
- 4.4.2 The College is an exempt charity for the purposes of Part 3 of the Charities Act 2011.
- 4.4.3 The College is regulated by the Welsh Government as Principal Regulator for all FE Corporations in Wales.
- 4.4.4 There are 26 members of the Corporation Board and 3 co-opted members, who are trustees of the charity. It is the Corporation's responsibility to bring independent judgement to bear on issues of strategy, performance, resources and standards of conduct. The Corporation meets five times during the year to conduct its normal business.
- 4.4.5 The Corporation has a strong and independent non-executive element and no individual or group dominates its decision-making process. The Corporation considers that each of its non-executive members is independent of management and free from any business or other relationship, which could materially interfere with the exercise of their independent judgement.
- 4.4.6 The Corporation conducts its business through a number of committees. Each committee has terms of reference, which have been approved by the Corporation
- 4.4.7 The Corporation has delegated the day-to-day responsibility to the Chief Executive, as Accounting Officer, for maintaining a sound system of internal control that supports the achievement of the College's policies, aims and objectives whilst safeguarding the public funds and assets for which the Chief Executive is personally responsible, in accordance with the responsibilities assigned to them in the Financial Memorandum between Coleg Cambria and the Welsh Government.

4.5 Location

- 4.5.1 The address for Llysfasi college is - Coleg Cambria Llysfasi, Ruthin Road, Denbighshire, Wrexham LL15 2LB.
- 4.5.2 It is located on the A525 between Wrexham and Ruthin at the base of the Nany Y Garth Pass. The closest village is Llanfair Dyffryn Clwyd.
- 4.5.3 The campus occupies 970 acres around the core teaching, learning and accommodation buildings. It lies within the Clwydian Range & Dee Valley AONB. Appendix 1 shows the site and location plan, the design has taken into account the comments from the AONB by locating on the footprint of a current building.
- 4.5.4 Being set in a rural environment, access to the college is via a number of A roads and in some cases B roads. Cardiff and Milford Haven, in South Wales, can be reached in 4 hours. While in Mid Wales Aberystwyth will take under 2 hours to get to and Welshpool just over an hour. In the North, Caernarfon will take nearly an hour and a half and Wrexham takes 30 minutes.
- 4.5.5 Due to the specialist nature of education at Llysfasi students travel from as far as Mid – West Wales, the Northwest of England and the Midlands. Traveling on a daily basis from many of these locations is cost prohibited and many require accommodation during their study time.
- 4.5.6 Students rely on cars to get to site, as public transport is minimal. The nearest railway stations are Wrexham and Rhyl (over 45mins away), the college does provide a mini bus pick up service for students but this is still quite a distance to add on top of the initial rail journey. The college has built a bus “station” on site to make it safe for student arriving by the bus, these tend to be local students who can attend on the day.

- 4.5.7 The college runs a mini bus service in the evenings for students to enjoy their leisure time. The wardens on site will drive and pick them up. Many use the local Gym in Ruthin or take mountain bikes up to One Planet in Llandegla. They also enjoy the pubs in Ruthin and the takeaways.
- 4.5.8 Those who stay on site during their leisure time make use of the Multi Use Games Area (MUGA) which is located outdoors on site and open for all students to use. For those wanting indoor entertainment the college has converted one of the workshops into a “Youth Club” area with facilities such as table tennis and gym equipment. Quiet social areas are provided on each floor of the new accommodation block “Breakout space” and the current accommodation block has a social room. The new Learning centre which opened in September 2024 contains a café and recreation area as well as a library, climbing wall and cinema.
- 4.5.9 It is hoped in a future phase of development a new social building will be built within the accommodation blocks to house a refractory, social/lounge areas, restaurant, television areas, laundrette, etc.

4.6 Management and Employment

- 4.6.1 Coleg Cambria employs over 1420 people on academic, support, hourly paid and management contracts.
- 4.6.2 Elin Roberts is the site lead of Llysfasi and Assistant Principle for Coleg Cambria. She runs the site with a team of 50 staff from three department areas – Library, Curriculum and Farm Management.
- 4.6.3 The growth in student numbers will have a positive impact on employment in the area, with potential 16 new roles in the academic department and 5 in the Farm Management department. As previously mentioned, the majority of staff employed at Llysfasi are locals. These roles will be skilled roles, a mix of full-time and part-time. It is hoped that with the constant requirement for accommodation upto 162 rooms will eventually be provided which will necessitate the employment of live-in staff/wardens.
- 4.6.4 Catering on-site is currently provided by outside caterers who service all the college sites. They are contracted to day time service and sporadic breakfast/evenings. With the increase in accommodation use this service will also need to increase and hopefully in time will become an internal service provided by the college itself.

5. GROWTH OPPORTUNITY

5.1 Students

- 5.1.1 In the past few years Llysfasi has seen a major change in its role with Coleg Cambria, from being an Agriculture college with animals to becoming a land based college with commercial partners. The process saw a big drop in student numbers which has, within 5-6 years been rectified and exceeded.
- 5.1.2 If the current trend continues there will be in excess of 400 students, per academic year, at Llysfasi by 2029.
- 5.1.3 The current growth is attributed to 2 commercial partners AGCO and Kabota who have created a series of training programmes for their future employees with Llysfasi. AGCO have developed the VALTRA apprenticeship school with 4 colleges across the UK, Llysfasi being their Welsh representative. Kubota work with Llysfasi, one other training provider and have their own training centre; Llysfasi lead on the Agriculture products and Ground care products courses.
- 5.1.4 5 years ago there was just the 1 cohort between the two partners, with 12 students, in September 2024 there will be 5 cohorts. Each cohort has between 20-45 learners who have to spend 36 weeks at Llysfasi on a block release programme, each block is normally 3 weeks. Some students spend 5 days on site then return home for the weekend, but due to distance travelled many stay for the full 3 weeks. In 2024 at any one time there can be upto 80 students needing accommodation on site
- 5.1.5 In September 2024 the campus is introducing a new HND qualification in Agriculture this is a 2 year full-time course which needs accommodation for the students. Therefore in any two years, there will be two cohorts of HND students requiring accommodation full-time.
- 5.1.6 It is not just the new commercial partnerships who provide students to the campus, standard land-based courses are still popular and growing. There are a 14 of cohorts all of which have expanded over the past two years, with between 16-24 learners on each. Many of the courses are full-time, of which only half drive, giving priority to the non-drivers to stay over on campus, but with opportunity to have more staying over if the accommodation is available. Currently 15% of students stay on site.
- 5.1.7 It is hoped that over the next couple of years the college will create another 2 agriculture cohorts and an additional 2 engineering cohorts.
- 5.1.8 Research delivered by Landex, a membership body supporting land based colleges and universities of which Coleg Cambria is one, in a report submitted to parliament shows that the growing trend in land based qualifications is not just at Llysfasi but across the country and one that is going to continue to grow.
- 5.1.8.1 According to the report *“The land-based education system is highly effective at enabling young people and career changers to develop the required knowledge skills and behaviours ready for sector progression.”*
- 5.1.8.2 *“Analysis of Further Education learner enrolment numbers on Land based courses in all settings has shown pleasing growth (2018-2022), with 77% of that growth in numbers being directly attributed to designated specialist land based providers. Early indicators are that there has been growth again in the current cohorts (2023-2024). Within agriculture, for 16-18 learners, between 2019/20 and 2021/22, the registrations increased by 26.5% overall (all sizes) and an 18% increase on large programmes. Over 99.85 % of all 16-18 enrolments in agriculture and agricultural engineering are at DfE designated specialist land based colleges. Apprenticeship starts are also seeing very pleasing growth in the sector, bucking the national data trend.”*
- 5.1.9 To tackle the challenges faced by education providers in the land based sector the GuildHE and Landex collaborated to launch the “Land Based Education Manifesto: A Foundation for Prosperity”

which has key recommendations to government, policymakers and wider stakeholders to aid with the growth in education for the land based sector.

- 5.1.9.1 *“Agriculture in the UK provides half the food that we eat and employs 4.2 million people across the agri-food sector. The gross value added to the economy in 2021 was 13 billion from agriculture and fishing alone, rising to 128 billion as a whole sector.”*
- 5.1.9.2 *“Understanding and managing land is fundamental to future national and global prosperity. Land and natural capital are growing in value. Crucially, every plausible path to meeting the great challenges of our time – food, water and energy resilience, and the climate and nature crises – hinge on transforming our relationship with land.”*
- 5.1.9.3 One of the 8 recommendations is to “Grow and Upskill the Workforce” identifying that –
- 5.1.9.4 *“Roles within the sector are now more complex, including the use of specialist equipment and harnessing advanced engineering, robotics and artificial intelligence. A clear understanding and articulation of the roles of the future and the underpinning knowledge, skills and behaviours is critical in order to draw from a wider talent pool, attract new talent and develop a workforce fit for the future.”* This is the training provided by Llysfasi.
- 5.1.10 The final recommendation is “Protecting Specialist Providers” by *“Support specialist colleges and universities to attract and retain talent in teaching and research”*. Key for Llysfasi’s growth is the need for more high standard accommodation on site.

5.2 Partnerships

- 5.2.1 Student numbers increasing will use the site from September to June, over the summer period there is opportunity to grow partnerships and relationships for the college on site. Using the new learning zone theatre and lecture space for 60 people will enable the college to host networking events, trainings sessions, conferences and trade shows for partners linked to the land based sector. Being able to provide high end accommodation for delegates attending from a distance including overseas will make the campus more desirable. In 2022 the college hosted the Wynnstay beef farmers event; this year Wynnstay are hosting more than 21 events across the county only one is in North Wales (this doesn’t include all the workshops they host). In November 2023 the college hosted “Wales Real Food & Farming conference, it attracted over 400 delegates with a number of the delegates staying on site.
- 5.2.2 Partners AGCO and Kubota both store equipment on site, to be able to offer them the facilities outside of the academic year, will provide added value to the partnership.
- 5.2.3 The community hub, built in 2020 hosts the local young farmers group as well as community training, in the summer this offer can be extended to larger groups from further distance who will require accommodation.

5.3 What is Needed

- 5.3.1 The college has seen an 80% increase in enrolment in the 2023/2024 academic year, the campus has just invested in a £8 million new Farming Futures Sustainability Hub for learning and development, in 2020 £1.2 million a community hub was opened and in 2024 a bus stop was built for students and local school children for safety as well as convenience.
- 5.3.2 The final piece of the puzzle is to increase and upgrade the accommodation offer. The existing accommodation comprises of a building with a number of blocks that provides 44 single occupancy rooms, welfare, eating and recreational facilities. Not all of these rooms provide en-suite facilities. The accommodation block is between 50 and 60 years old. It has been upgraded where possible, but there are limitations. The building itself is not economically efficient with high heating costs and lacks the current sustainable building requirements.
- 5.3.3 In academic year 2023/2024 with 38 full-time students using these facilities there is a significant gap in demand for the 70, 3 year, students enrolling through the commercial partners, and this gap will grow year on year.

- 5.3.4 Currently to overcome this gap Bunka Bins have been hired for the 16-18 year olds and accommodation has been sourced as far away as Llandudno for older students with cars, this is a temporary measure and one which the commercial partners have accepted for two years, but have threatened to use another college if the accommodation situation is not resolve by academic year 2025/2026. In academic year 2024/2025 89% of leaners are 16-18 years of age, 9% 19-24 and 1% over the age of 25 years.
- 5.3.5 In an ideal world the current accommodation will be demolished and new accommodation blocks built, however, with the demand this is not practical and the current facilities need to remain, while a phased accommodation plan is put in place. Phase one is outlined in Appendix 2, a new 50 bedroom accommodation block, 3 storeys split to male and female sections, each room ensuite and each section has its own break out area with kitchenette and relaxed seating. The block contains 4 accessible rooms. This building will be built on the footprint of the current administration building, which will become vacant over the course of academic year 2024/25 while the offices relocate into the new learning hub and will be demolished.
- 5.3.6 There are likely to be 3 more phased accommodation builds, including another similar build to that in Appendix 2, the removal and then rebuild of accommodation on the current accommodation footprint and the building of a refractory, social area and laundrette within the accommodation area, for student use. It is planned for 162 rooms overall.

6. PRODUCTS & SERVICES

6.1 Education provider

- 6.1.1 As an industry leader in land-based education Llysfasi delivers on 4 key subjects
- 6.1.1.1 Agriculture – a subject which Llysfasi has provided for over 100 years. Now without the animal care element of the subject, there are 4 courses available, a level 2, level 3 and two HNC qualifications, 3 of which are full-time.
- 6.1.1.2 Land Based Machinery – This has seen the largest growth especially with the two commercial partnerships. With 9 courses currently on offer at all entry points, all of which are full-time (or full-time block release as part of the apprenticeship programme).
- 6.1.1.3 Forestry & Arboriculture – A new and growing area, which has seen the need for a climbing wall to be incorporated in the new learning and development hub. With 18 courses available many are part-time or day courses, there are 3 full-time courses.
- 6.1.1.4 Countryside Management – A potential growth sector with 2 full-time courses.
- 6.1.2 The commercial partnerships mean the campus has top of the range machinery, equipment and technology for all students.
- 6.1.3 Unlike many FE colleges, Llysfasi attracts students from around the UK due to the international status of the commercial partners. Many students spend time overseas as part of their apprenticeship programme.
- 6.1.4 Full-time students have an on campus experience with social opportunities such as outdoor Multi Use Games Area (as part of the phase one accommodation build flood lights will be installed), a 5-a-side hard standing pitch, sports hall, a gym, indoor “youth club” style area with table tennis, a café and refectory, climbing wall and cinema area as well as a number of relaxing social areas. There is a catered food hall and plans within the new build for self-catering kitchenettes. A laundry room is available in the accommodation block, although students have to remove all protective clothing at the training workshops before leaving for accommodation.
- 6.1.5 Although located in a rural location, students have the opportunity to be driven into Ruthin by wardens, who are on site 24hours a day, to use the local gym, buy food or socialise, the mini bus will bring them back as well.

6.2 Community Support

- 6.2.1 In 2021 Llysfasi opened a community hub, a £1.2 million development funded via the college through the Governments “Prosperity for All” vision to provide more education links to towns and villages across the country. The hub is bilingual and family and community focused.
- 6.2.2 The two-storey hub includes IT and multimedia suites, workshops, classrooms, breakout spaces, a kitchen, offices and meeting rooms.
- 6.2.3 The college offers special rates for the local community to be able to utilise the facilities. Groups such as the WI, community learning and community council groups use it as well as local micro businesses such as spinners and weavers and flower arranging groups.
- 6.2.4 Farmers connect, an enhanced programme of support for farmers and foresters in Wales, use the community hub for training sessions and support meetings for local farmers.
- 6.2.5 Clwyd Young Farms – host the Ruthin branch meetings at Llysfasi.

6.3 Conference & Events

- 6.3.1 The facilities are not used for teaching during June-mid-September, which opens them up to be utilised for farming/land-based related events on-site.
- 6.3.2 During the summer Llysfasi rents out space to 6 local primary schools who bring pupils for ½ week on an outward bound residential.

- 6.3.3 As mentioned previously Llysfasi has already played host to a number of one off conferences, before they has the new “Farming Futures Sustainability Hub”. This hub has been designed with partners in-mind, it is equipped to enable partners in engineering, forestry and countryside management to demonstrate the latest technology and advances in their industries. They can host trade shows on site, using the machinery warehouses within the campus.
- 6.3.4 The site is large enough to hold over 500 people, with outdoor and indoor facilities for demonstrations, displays and presentations. The team at Llysfasi will focus on their roots in the agriculture and land-based sectors to attract buyers for associations in this sector.
- 6.3.5 With the current commercial partners, conference buyers do not need to be limited to local business. The MICE sector is growing once again after being hit badly during Covid and the inbound market is growing with it. According to The Medium report “Meeting and Events Trend 2024” optimism in the meeting & events sector continue, 90% of event planners surveyed indicated they will produce as many or more meetings in 2024 than previous years. It states that they recognise costs will rise and continue to rise and 67% of those respondents indicated their spend budget for meetings will also increase. Sustainability is key to venue selection, 90% of those surveyed seek sustainable options in their venue choice from transport options to energy efficiency to F&D suppliers it is all important and needs to be considered. The event venue providing unique experience space or space to create an opportunity for a memorable and engaging experience is especially important to event bookers. Cvent the conference event bookers also highlight the need for experience-first events “As attendees expectations continue to rise, there’s added pressure for event organisers to find unique venues that can support immersive and interactive experiences.”
- 6.3.6 Bookers are looking to use technology to cut down on venue visits, such as digital VR or virtual tours, this is supported by the MIA’s insight report in July 2024 that states 81% of the sector believe AI has a key role to play in its future, with current users including drafting RFPs, handling enquiries, developing marketing copy and website chatbots. At the conference or event itself, VR and AR are making a space for themselves. Augmented reality can be especially useful at tradeshows or business conferences. AI has also steadily been earning its place within the industry.

7. LOCAL ECONOMY

- 7.1 As an organisation Llysfasi will not be the sole beneficiary of the growth in students from the increased accommodation provision
- 7.2 The refectory already serves food from a local caterer, who services all the Coleg Cambria sites, they use local North Wales produce. With the increase in overnight students, breakfasts and evening meal requirements will all increase.
- 7.3 Although food is provided, many of the students are likely to go off site to buy take aways and visit the pubs in Ruthin. As mentioned in 3.3.2 a typical student spends £110/month on activities, which does not include the £30.96 on alcohol and £28.80 on food. Therefore with the additional 120 students at Llysfasi due to the increased accommodation, an additional spend of £169.76 per student per month, will result in an additional £20371 per month for 10 months additional spend in the local economy. Or just over £200k per year.
- 7.4 The majority of the staff on site are from the local area, many staying in employment for the majority of their career. With the increased numbers of students it is anticipated an additional 19 roles will be created over the next 4-5 years.
- 7.5 The loss of over half the students at Llysfasi due to lack of accommodation provision is likely to have a detrimental effect on the local economy.
- 7.6 According to the 'UK Conference and Meeting Survey 2023' (UKCAMS), in 2022, there were an estimated 1.02 million conferences and meetings in the UK, representing a substantial recovery from 2020 and 2021 (0.2 million and 0.44 million events respectively). Such events generated an estimated £16.3 billion of direct expenditure in venues and the wider destination, compared with an estimated £4.9 billion in 2021. Although this does not show exactly how much spend the destination benefited from it does show every conference/event will benefit the local economy in some way, either from indirect spend of the venue or via direct spend of the delegates passing through.

8. MARKETING STRATEGY

8.1 Target Customers

- 8.1.1 Coleg Cambria employs a dedicated marketing team to promote the college's 6 sites, in general as a FE college. They have specific plans for each campus based upon its specialised area.
- 8.1.2 The main segmentation targeted are school leavers, parents, the local community and adult learners looking to upskill.
- 8.1.3 The marketing team have found that the usual digital marketing means, Facebook/Instagram/twitter, work well, they are also enjoying success in more traditional methods such as community magazine and events.
- 8.1.4 As one of the leading land-based colleges in the country Llysfasi students interested in agriculture, forestry, land management etc are the key targets. However as the industry changes with the fast pace of technological advancement it is driving skills' needs and the emergence of new positions in the sector. These positions often require advanced technological skills drawing on analytical approaches, critical thinking and problem solving linked to scientific research, data science and mathematical modelling.
- 8.1.5 Being the leading specialised college in land-based studies, the marketing team attend sector specific events such as the Royal Welsh show, as well as featuring in sector specific media.
- 8.1.6 Key targets learners aged between 16-18years old for the FE courses and 18+ - 25years for the HE level courses. The college does also provide Adult learning and 1 day CPD courses.
- 8.1.7 Working with local schools, education partners and sector related organisations the college promotes the product and career aspirations to potential students. They have found opening the college for visits has worked well, allowing potential students and their parents an opportunity to visit the site and see for themselves the environment they could learn in. The website provides 360 degree video of sites within the campus allowing students from a distance to visualise the campus before committing to their visit.
- 8.1.8 The growth in numbers has come from the two commercial partners, it is their marketing team and promotion which has seen the huge 80% growth in student numbers. They are committed to continue the partnership and can see the potential growth, conditional to the provision of permanent accommodation.

9. FINANCE

9.1 Student income

- 9.1.1 Colleges across the country are under pressure financially due to rising staff costs, high building costs and falling enrolment numbers
- 9.1.2 In order to counter much of this pressure Coleg Cambria has worked hard to identify new ways of income generation. The grants team are successful at bidding for capital build funding, at Llysfasi alone over £10 million has been spent recently, on the community hub and learning hub, ensuring the college remains sustainable and attractive to future students.
- 9.1.3 The new accommodation block is just one of a number of planned phases to entice more full-time residential students to Llysfasi. Taking old 1960s accommodation and making it energy efficient and appealing to future students.
- 9.1.4 One of the growing opportunities for colleges is to partner with commercial businesses. This is where Llysfasi is leading the way. The two programmes established over the past 5 years have become the catalyst for growth, with the new teaching hub and now the pressure for new high quality student accommodation. The college has been reluctant to fund the new accommodation build whilst the programmes have become established, but time has run out and with the pressure from one of the commercial partners to provide more accommodation the college has to act. Currently the offer has meant the college has lost money on the programmes due to outsourcing the accommodation, however with the proof there is popularity in the programme and this can only grow, now is the time to look at new accommodation.
- 9.1.5 For every student between the age of 16-19 the college receives £7100 per year from public funding.
- 9.1.6 Students over 19 pay their own tuition fees, many receive grants, at Coleg Cambria for a HND is £5000 per year.
- 9.1.7 Therefore in today's academic year of the 300 students -
 - 9.1.7.1 89% of learners are 16-18 yrs old = £1.9million income
 - 9.1.7.2 9% of learners are 19-24 yrs old = £13500 income
- 9.1.8 Of those learners 110 are staying on site, if the accommodation is unavailable to them and the commercial partners pull out of the college nearly £1 million income will be lost to Llysfasi in tutorial costs alone.
- 9.1.9 With the college employing over 50 staff, the majority from the local area, this will have detrimental impact on local income is staff need to be made redundant.
- 9.1.10 The college also employs local contractors from North Wales for the capital build and onsite developments, without its growth these companies will have reduced income and therefore spend.

9.2 Accommodation Income

- 9.2.1 The college charges additional costs for overnight accommodation onsite of £121 per week.
- 9.2.2 This year there will be around 120 learners requiring accommodation over the 34 weeks of academic learning, which provides an additional income of just under £500,000 per academic year. These costs include breakfast, which is provided by the college catering services another local business supported by the college.
- 9.2.3 Currently the college has 44 single occupancy rooms, to meet demand 40 portable bedroom units have been hired in and the additional requirements have been sought over site. By only charging £121/week the college is currently paying additional costs to enable them to meet demand.
- 9.2.4 Once the new, more modern, energy efficient accommodation is built the college will begin to breakeven.

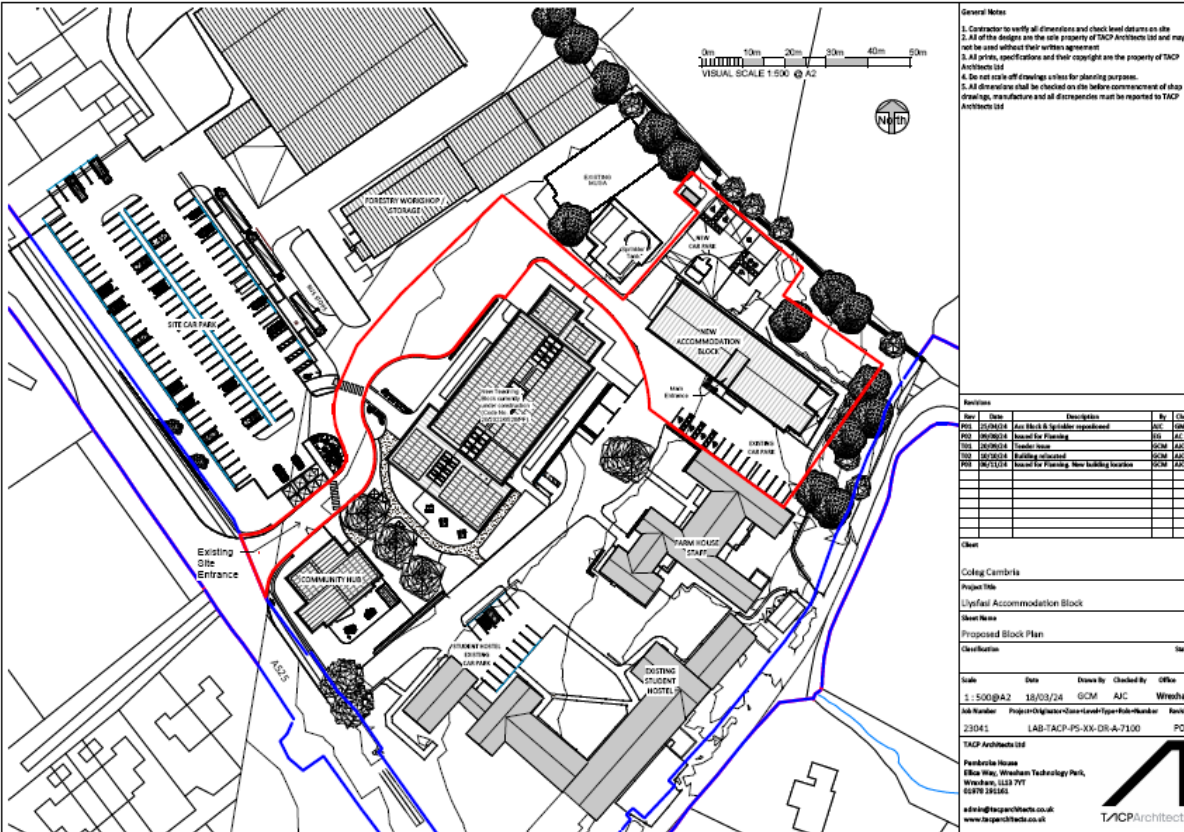
- 9.2.5 It is anticipated the demand for course places and therefore accommodation will continue, at which time additional phased accommodation blocks will be required.

9.3 Conference and Events Income

- 9.3.1 According the UKCAMS (Conference & Meeting Survey) the average day delegate rate in 2023 was £46 and 24 hour /residential rate was £158.
- 9.3.2 The EIC Global Events Barometer suggests that 2023 saw sustained growth in Business Events performance with hotel room nights surpassing pre-COVID levels.
- 9.3.3 SASIE (Size and Scale Index for Exhibitions 2023, Economic Impact of Exhibitions in the UK 2023) showed that in 2023 trade exhibitions accounted for the largest proportion of the market at 42%, something Llysfasi will be interested in leading on during academic holidays.
- 9.3.4 The same research stated that in 2023 on average exhibitions occupied a venue for 4.7 days.
- 9.3.5 Although Agriculture, forestry and animals score low on the most prominent industry sector for exhibitions is did see a growth in 2023. This maybe a small sector to host exhibitions but the awareness of Llysfasi as a leading Land based agriculture college will enable it to be one of the “go to” exhibition venues.
- 9.3.6 In 2023, 40% of meetings in the UK had 40-149 attendees, and were most likely to take place in September or June. On average, meetings were ongoing for 3.5 days, with universities being the most popular venues.
- 9.3.7 If Llysfasi is able to attract 5 exhibitions a year, which average 4 nights, hosting 100 people at £158 per night they could attract an additional income of £316,000.00
- 9.3.8 The Delegate Expenditure Benefit is based on the original research undertaken in 2006 in partnership between VisitScotland, Failte Ireland, VisitWales and VisitBritain. The research looked at the various components of expenditure for each event type and arrived at a figure, the Direct Expenditure Benefit (DEB) rates that is recognised across the UK and Ireland. Direct Expenditure Benefits (DEB) are calculated as delegates x days x DEB rate = direct expenditure benefit (DEB) to a destination. The DEB values account for all spend on and by a delegate when visiting the UK/Scotland, excluding the transport to get to the destination, be that the UK, Scotland or Dundee. This includes venue hire, catering, AV, accommodation, local travel, gifts, incidental spending etc.
- 9.3.9 Using this equation for every 100 delegates attending a 4 day Domestic Association multi-day event at Llysfasi £280000 of direct expenditure benefit to the destination will be generated.

10. APPENDIX

Appendix 1 – Site and Location Plan



Appendix 2 – New building plan

