

Feasibility study with local employers,  
students and key stakeholders for the  
future development of the construction  
curriculum

# Design Your Future

Coleg Ceredigion

By



November 2019

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## 1. Executive Summary

### Introduction & Context

In 2019, Coleg Ceredigion appointed Perspectif to undertake a consultation among construction businesses, with key stakeholders and students in order to gain a deeper understanding of the issues and skills needs of the local sector.

The objectives of the consultation were to

- Gain a good understanding of the skill needs of local construction businesses
- Identify how links between the college and businesses can be strengthened, to ensure the development of appropriate courses and skillsets for graduating students
- Understand what motivates young people to take up construction as a career option
- Understand Welsh Language needs in the workplace
- Identify emerging opportunities for the construction sector in Ceredigion

The sector in Ceredigion, as across the whole of Wales, predominantly comprises micro businesses with less than 10 employees. However, there are some very differing attitudes and expectations between these micro businesses, particularly among those with less than 5 employees and those that employ more. For the purpose of this report, the term “larger businesses” refers to businesses with 6 or more employees.

### Methodology

The consultation combined a number of different methodologies to ensure the collection and evaluation of the views of a wide range of stakeholders within the construction sector in Ceredigion. These comprised:

- An initial online survey with construction businesses
- Drop in sessions with construction students at the Coleg Ceredigion campus, Cardigan
- Follow up depth telephone interviews with additional businesses in the sector
- In depth interviews with key stakeholders for the sector

### Overview of the Findings

Overall, those working in construction and key stakeholders share the same key thoughts and concerns for the sector in Ceredigion.

### *Adapting to change and innovation*

There is a shared consensus among the businesses that the sector in West Wales is adapting to changes in regulation and the development of new methods and innovations within the sector. However, it is widely acknowledged that keeping up with new developments is not always easy or appropriate for many smaller firms whose main business focusses on renovation, home improvements and retro fitting the older housing stock across the region.

The stakeholders identify many opportunities for the sector particularly in terms of the new Swansea Bay City and Mid Wales Growth Deals but fear that where companies are unable to keep up with the latest developments they may be unable to secure contracts within these deals.

### *Skills Shortages and Challenges*

Both businesses and stakeholders highlight the skills issues as a major threat to the sector in Ceredigion. Larger businesses in particular, are likely to be experiencing skills challenges causing significant risk to their ability to go for larger projects in the region. Businesses highlight that it is vital their new recruits have good levels of general skills, with the larger firms looking for a mix of general and specialist skills in their new recruits. The skills highlighted as essential for junior new recruits include good basic technical construction skills as well as more interpersonal skills and a basic level of education in numeracy and literacy. The businesses highlight that in general they feel these have been lacking in many of the new recruits they have taken on resulting in slow progress within the workplace.

### *Apprenticeships*

Apprenticeships play a pivotal role in the development of the workforce of the sector. However they are currently mainly used by businesses with more employees (6 or more). If the number of apprentices is to increase, it is essential that very small businesses are targeted specifically and shown how taking on an apprentice could be of benefit.

The students are proud of the skills they are learning and would overwhelmingly recommend construction apprenticeships to their friends and family, highlighting the cohort as excellent ambassadors for the programme. In contrast, however, businesses tend to feel that apprentices are not particularly well-equipped for the workplace, with basic education in maths and English key aspects of this. This highlights a considerable gap between the expectations of businesses in terms of the skills needed and the apprentices themselves.

However, despite the current issues surrounding work readiness of apprentices, two thirds of the businesses say that they would take on an apprentice in the near future. This presents significant scope to develop more placement opportunities for students / apprentices and increase the number of apprentices working in the sector.

Stakeholders highlight the need for:

- apprenticeships to be tailored and flexible to the needs of learners and businesses
- the negative perceptions of the construction industry to be addressed and the range opportunities for learners of all abilities to be more widely promoted
- technology to be utilised to the full to maximise opportunities for learning, and for
- modular courses to build specialist skills in the region

## Conclusions

The research demonstrates that while there are successful elements of the apprenticeship programme delivery, overall it could be substantially improved with a more joined up and co-ordinated approach between the construction and education sectors.

The consultation identifies 3 key areas that require development:

- **Skills shortages**  
Businesses are looking for good solid basic skills from their new recruits, and while there is a gap in specialist skills in the sector, businesses are not looking to apprentices to fill these. They need apprentices to have a good basic education, as well as good foundational skills for the sector (tools and techniques). This will improve their work-readiness.
- **Readiness for work**  
Preparing apprentices for the workplace is critical to the development of the programme. As long as businesses feel that apprentices are not work-ready, there will be a reluctance among small firms to take them on, fearing that they will be more hassle than they are worth. Ensuring apprentices are well prepared for work with skills such as numeracy, language / communication and problem solving alongside their construction skills, will improve the reputation of apprenticeships and will help attract more businesses to the programme.
- **Relationship Building**  
The smaller micro businesses, which form the majority of the sector across West Wales, feel they have no links with the education sector. They are, however, keen to see this change and would welcome opportunities to work with the College. Suggestions to achieve this include:
  - a. Employer-led steering groups – to help shape the curriculum, making courses more flexible and relevant and offering options to “share” apprenticeships between small businesses
  - b. Open days & events at trade stores to promote apprenticeships among businesses that may not have previously considered them
  - c. Direct communication and dialogue with local businesses to improve understanding of business needs and increase links with local businesses

There are significant opportunities to improve relationships and connections between the college and the sector. Not only will these increase the range of work placement opportunities for students, they will also improve the skills levels of students, improve their work readiness, rate of success and attract a wider range of students.

Apprenticeships are a crucial element of the workforce within the sector, so it is vital that these learners are given the best platform from which to start their careers. Addressing the above 3 key elements are critical to the successful development of the apprenticeship programme at Coleg Ceredigion, and will ensure learners, businesses and the sector within the region benefits from a more capable and skilled workforce.

## 2. Introduction

### 2.1. Context

In 2019, Coleg Ceredigion appointed Perspectif to undertake a consultation among businesses, with key stakeholders and students in order to gain a deeper understanding of the issues and skills needs of local construction businesses. This project has received funding through the Welsh Government Rural Communities – Rural Development Programme 2014-2020, which is funded by the European Agricultural Fund for Rural Development and the Welsh Government.

The college is keen to develop its training offer for students/learners, equipping them with relevant and needed skills. This will ensure a suitably qualified and equipped workforce, and also help to retain the workforce in the area, contributing significantly to the local economy and helping to address the social challenges facing the area.

### 2.2. Objectives

The project objectives are defined as being to

- Gain a good understanding of the skill needs of local construction businesses
- Identify how links between the college and businesses can be strengthened, to ensure the development of appropriate courses and skillsets for graduating students
- Understand what motivates young people to take up construction as a career option
- Understand Welsh Language needs in the workplace
- Identify emerging opportunities for the construction sector in Ceredigion

### 2.3. Methodology

The Consultation approach combined a number of different methodologies to ensure the collection and evaluation of the views of a wide range of stakeholders within the construction sector in Ceredigion.

In total 63 individual construction businesses participated in the consultation<sup>1</sup>

- 30 completed an initial online survey to identify key areas for further exploration and gather some initial key data

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<sup>1</sup> The numbers of businesses consulted represents 5% of the total number of Construction businesses in Ceredigion. While the base size is (63) too small to be considered statistically reliable ( $\pm 12\%$  confidence interval), it is representative of the sector

- 40 businesses were involved in follow-up depth telephone interviews, to explore some of the issues raised in the online survey in more detail
- 7 businesses participated in both the online and telephone interviews

42 construction students, at different stages of their training, were involved in the consultation, sharing their thoughts on the apprenticeship course, the skills they learn and the local construction sector.

And depth interviews were conducted with 6 key stakeholders to increase understanding of the wider issues affecting the sector and to gain a better understanding of how the College can strengthen links with the sector.

The developmental approach also ensured that we were able to review initial findings with students and businesses before starting the telephone interviews. This ensured that subsequent interviews with further businesses and key stakeholders focussed on key issues and explored them in greater depth.

### 3. Full Findings

#### 3.1. The Sector in West Wales

##### 3.1.1. Overview

In 2018, there were a total of 7,995 construction enterprises based in Carmarthenshire, Pembrokeshire and Ceredigion<sup>2</sup>. This represents 17% of the total number of enterprises in Wales.

The sector is dominated by small businesses across the country; 98% of construction businesses in Wales are categorised as micro businesses with less than 10 employees. This picture is reflected across the counties of Carmarthenshire, Pembrokeshire and Ceredigion.

	Construction	Micro businesses (0-9 employees)	micro as % of all
<i>All Wales</i>	<i>47,405</i>	<i>46,430</i>	<i>98%</i>
<b>Carmarthenshire</b>	4,165	4095	98%
<b>Pembrokeshire</b>	2,680	2640	99%
<b>Ceredigion</b>	1,150	1125	98%
<b>TOTAL WEST WALES</b>	<b>7,995</b>	<b>7,860</b>	<b>98%</b>

These micro businesses are the foundation of the sector in West Wales and as such it is essential that the needs and limitations of these small businesses are recognised and catered for in the development of apprenticeships and training programmes. However, there are some very differing attitudes and expectations between these micro businesses, particularly among those with less than 5 employees and those that employ more. For the purpose of this report, the term “larger businesses” refers to businesses with 6 or more employees.

##### 3.1.2. Views of the sector in West Wales

Opinion on the current state of the sector in West Wales is divided among businesses, particularly in terms of embracing new building methods and how well the sector is doing.

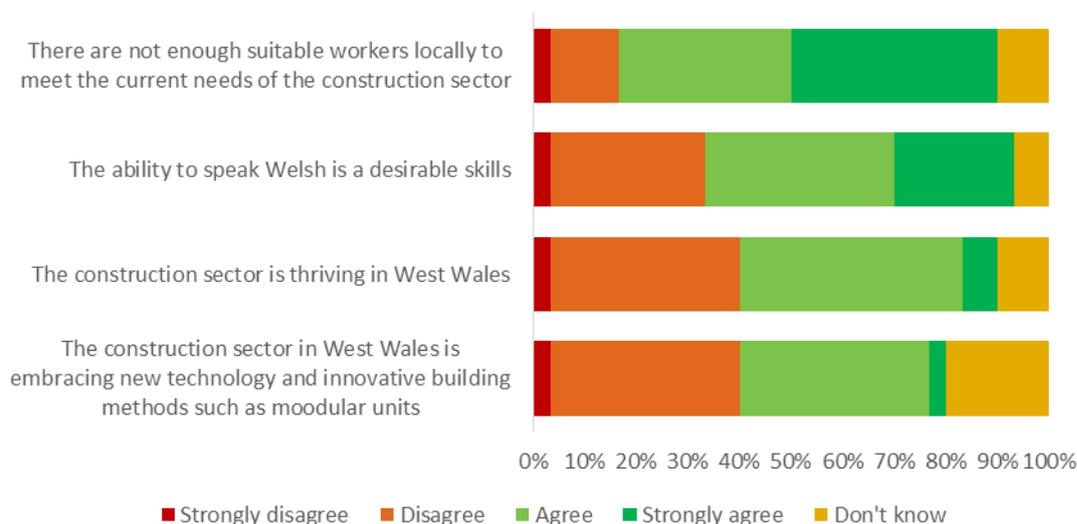
Around a third do not feel that the sector is thriving and cite a shortage of skills as a critical factor in this. Around two thirds of the businesses responding to the online survey feel that there are not enough suitable workers locally to meet the current needs of the sector<sup>3</sup>.

<sup>2</sup> Source: Statswales.gov.uk (2018)

<sup>3</sup> Further detail can be found in Appendix I: Online Business Survey Summary Report

While the ability to speak Welsh is considered to be a desirable skill when asked specifically about it, few businesses spontaneously identify a lack of Welsh language as a concern for them, instead numeracy and general communication skills were more frequent issues.

### Views on the construction sector in West Wales



The stakeholders, however, feel that the sector in West Wales is full of opportunities for businesses, citing in particular

- The Swansea Bay City Deal and Mid Wales Growth Deal
- Energy sector: increasing thermal capacity, renewables and sustainable construction, and
- Heritage construction

They do also highlight a number of threats to the sector including:

- Businesses from outside the area winning larger contracts and attracting skills away from the local area
- BREXIT – and any reduction in skills funding this may bring
- Image of the sector – including high profile collapses i.e. Dawnus
- Difficulties in encouraging micro-businesses to invest in learning and development
- Lack of professionalism in the sector i.e. ‘The Pembrokeshire promise’, Poor reliability and customer service attitudes and behaviours among SMEs and micro businesses.

Issues which few of the businesses themselves recognise.

### 3.1.3. The sector in West Wales: Adapting to change

Overall, among the businesses, there is a general consensus that the construction sector in West Wales is adapting to changes in construction and manufacturing methods and continually updating building regulations. This willingness to adapt to new methods, however, is balanced by the need to maintain skills in basic and traditional methods that suit the needs of customers throughout the

region. With typically older housing stock and demand for renovation work, home improvements and retro fitting dominating the type of work required currently, there is limited scope for many of the businesses to be involved with cutting edge, new technology and innovations.

Stakeholders acknowledge the challenge smaller companies have adopting new innovations, and raise concerns that this may threaten the opportunities they can pursue. There is concern that small businesses and sole traders do not take innovation seriously and that there are few opportunities for them to develop their knowledge and get informed.

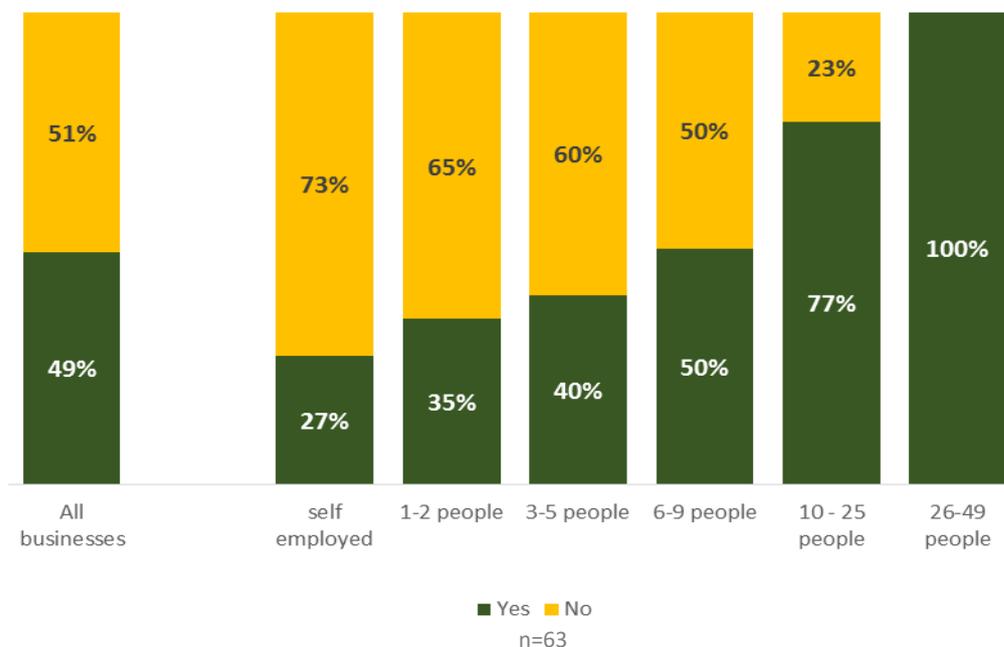
Despite the concerns of stakeholders, many of the businesses interviewed (73%) feel that they are innovative. They qualify these sentiments by highlighting that it is essential they are able to offer the latest solutions and up to date knowledge to customers in order to remain competitive<sup>4</sup>. Setting aside time for training is one of the greatest challenges faced by businesses trying to keep their knowledge current.

### 3.2. Skills challenges and the construction sector in West Wales

#### 3.2.1. Skills shortage

Overall, the Construction sector in West Wales is fairly split about whether there is a skills shortage in the sector. Around half (51%) are currently experiencing skills shortages in their business, while the other half (49%) are not<sup>5</sup>.

Currently experiencing skills challenges with the business by size of business



<sup>4</sup> Further detail can be found in Appendix II: Business Telephone Interviews Summary Report

<sup>5</sup> Overall results are aggregated from the online and telephone survey; Base n=63 all businesses spoken to

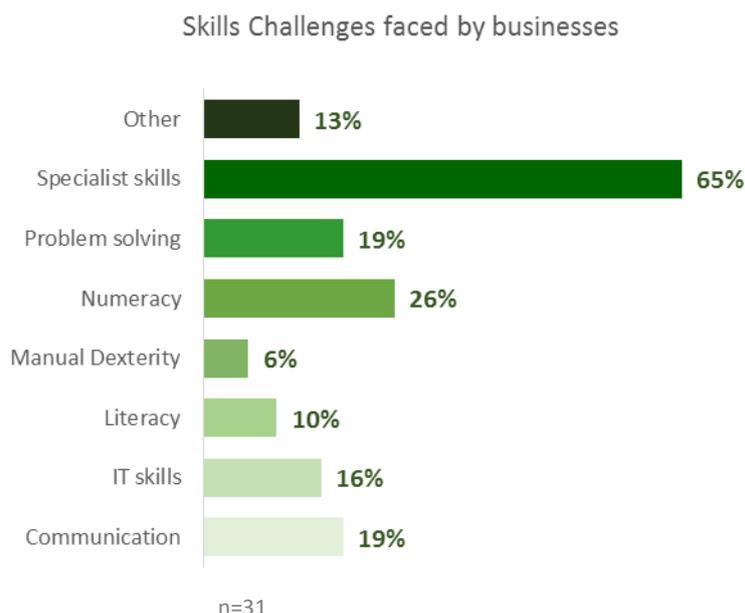
When looking at these findings by size of business, those that are most likely to be experiencing skills shortages are those employing 6 or more people. Those with fewer employees, tend to be happier with the skill levels within their businesses.

Stakeholders also recognise that there is a skills shortage within the construction sector in West Wales and are keen to work alongside the College to address this and secure the future of the sector locally.

### 3.2.2. Skills Challenges

When asked about the skills challenges they are experiencing, these businesses highlight their need for specialist skills. Almost two thirds of those experiencing skills shortages, say that they currently have a need for specialist skills within their business.

Numeracy, communication skills and problem solving are also highlighted as being current challenges for businesses:

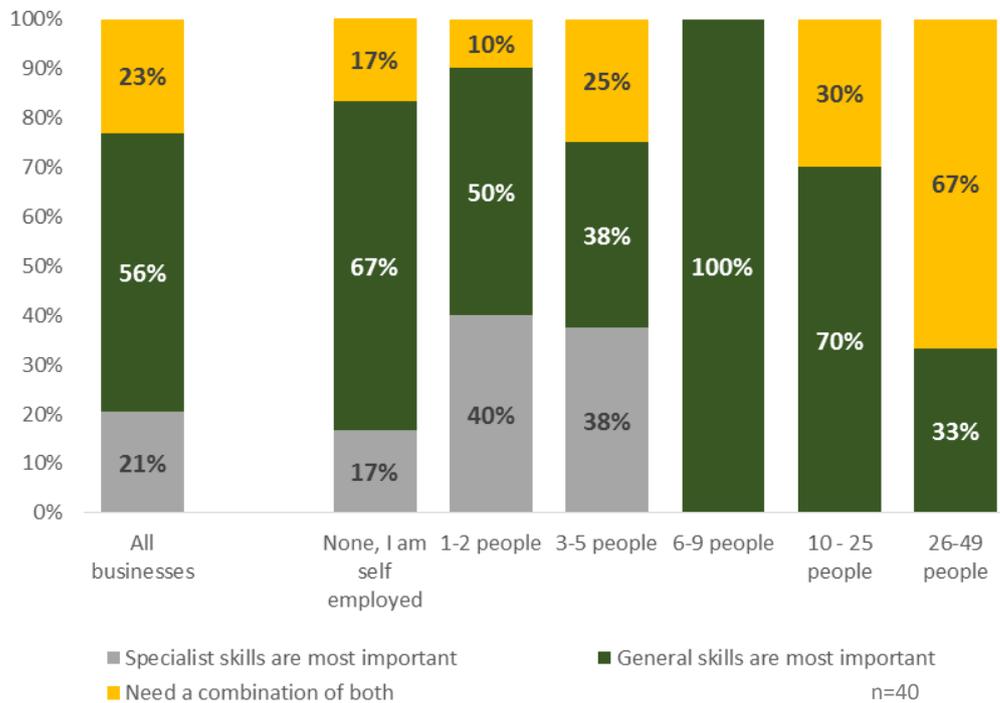


To assess this issue in greater detail, businesses participating in the telephone interviews were asked in more detail about the need for specialist or more general skills in their new recruits.

Almost 6 in 10 of the businesses say that general skills are most important to them when recruiting new staff. Specialist skills are more likely to be needed by very small businesses, those with between 1 and 5 employees. Around 4 in 10 of these businesses say that specialist skills are most important to them.

While general skills or a combination of both general and specialist skills are more important to the larger businesses.

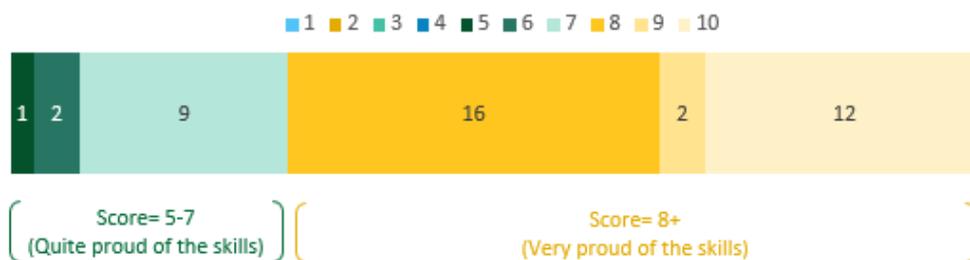
Which type of skills are most important to your business  
by number of employees in the business



Therefore, despite saying that they are currently experiencing a shortage of specialist skills within their businesses, owners and managers are on the whole looking for a good foundation in general skills, including an understanding of the tools from their new recruits. In addition they look for some essential personal qualities such as reliability and punctuality<sup>6</sup>.

The students themselves are very proud of the skills they are learning at Coleg Ceredigion. They are happy and confident taking these out into the workplace, suggesting that those businesses with apprenticeships joining them are gaining some of those basic skills that are so needed by other businesses in the sector.

Students' sense of pride in the skills they are learning  
(scale of 1-10, where 10 is extremely proud)



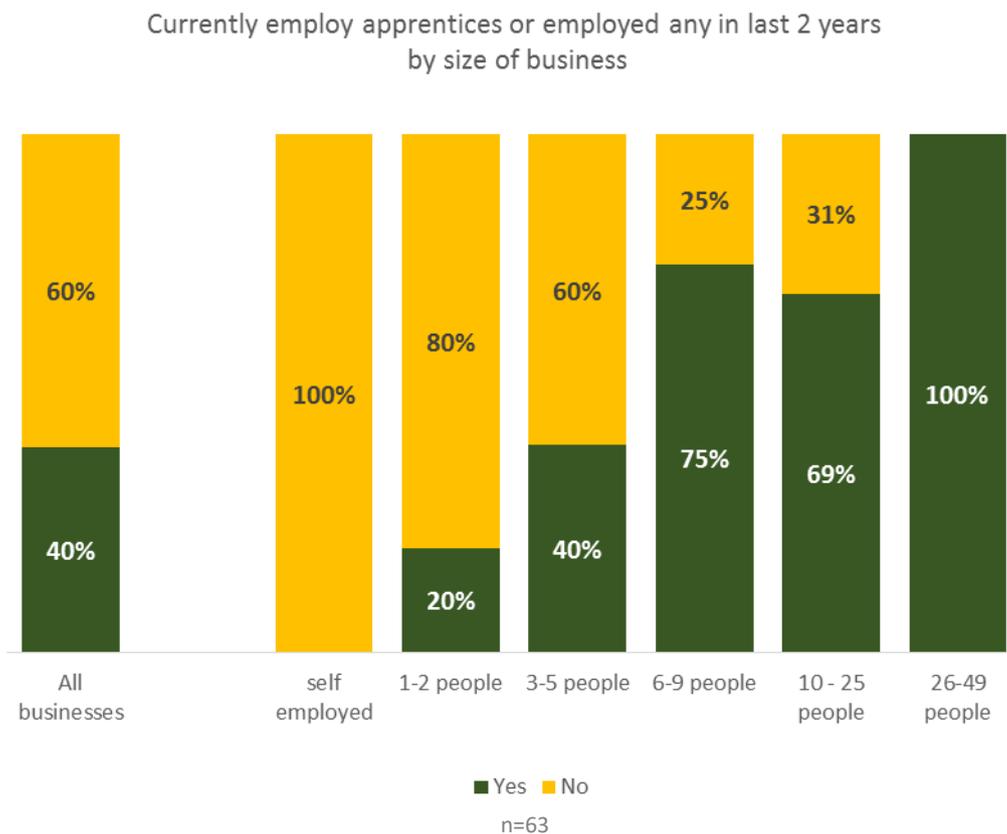
<sup>6</sup> More detail can be found in Appendix II – Design Your Future Business Telephone Interviews

The stakeholders also identify that blended learning is more appealing to micro and small businesses and that providing a foundation in construction skills would equip learners with broader skills sets and be of higher value to the businesses. They stress the need for the curriculum to deliver what is relevant to businesses, and highlight the need for quality over quantity. One of the stakeholders suggests that an employer led steering group could help improve things further by looking specifically at skills needs of businesses and how the curriculum can help to address these.

### 3.3. Apprentices

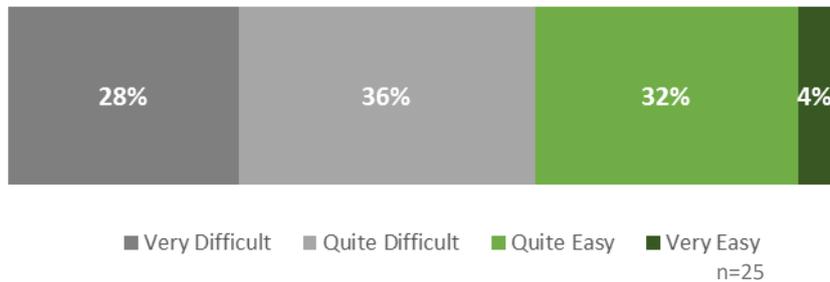
#### 3.3.1. Taking on apprentices in businesses

The majority of businesses (60%) have not had any apprentices working with them in the last 2 years. Those that have taken on apprentices, tend to be the slightly larger businesses, employing 6 or more people:



Those that have taken on apprentices within the last 2 years, tend to say that they found it fairly hard to find someone suitable; almost two thirds (64%) found it either very difficult or quite difficult. Those that found a suitable apprentice easily tend to have been approached by friends or family to take someone on.

Ease of finding suitable apprentices

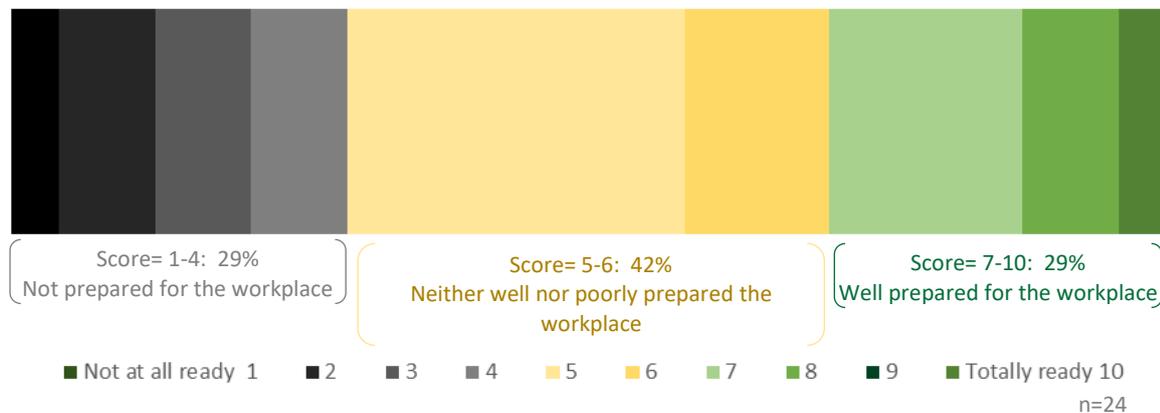


3.3.2. Work readiness

On the whole, businesses feel that the apprentices are not very well equipped for the workplace. While some have had very positive experiences with apprentices that were very well prepared to enter the working environment, the majority feel that their apprentices have lacked many of the basic skills they would expect them to have.

On average, businesses rate the work-readiness of apprentices at just 5.3 out of 10, suggesting that more could be done to prepare students before they enter the workplace.

How well equipped for the workplace have the apprentices been?



Despite this generally poor view of the effectiveness of apprenticeships currently, two thirds of the businesses<sup>7</sup> say that they would take on an apprentice in the near future, highlighting just how crucial they are as an entry point to the sector and as a funnel for the construction workforce of the future.

Overall, the students are really positive about their experiences with the Construction courses at Coleg Ceredigion. Almost without exception (40 of the 42) they would recommend the construction

<sup>7</sup> Source: Business Online survey. Further detail can be found in Appendix I

courses to friends and family, with several adding that it has changed their perception of the sector for the better.

Given that the students themselves generally feel very proud of the skills they are developing, it seems that there is a considerable gap between the expectations of the businesses and the apprentices themselves. It is essential this is closed in order to increase satisfaction with the apprenticeship programme, both on the part of the sector and to lessen drop-out and low achievement by some students.

### 3.3.3. Addressing the issues of apprenticeships and meeting the needs of businesses

Just as businesses have struggled with finding the right type of candidate for their apprenticeships, students too have found it difficult to find suitable businesses to take them on. In order to really make a success of the programme, businesses of all sizes and in all parts of the construction sector need to be made aware of the benefits of taking on an apprentice, and be encouraged to do so. Not only will this increase the number of opportunities for learners, it could also help to attract more learners because of the increased range of opportunities available.

As the sector in West Wales predominantly comprises micro and very small businesses, it is vital that these are targeted specifically and shown how taking on an apprentice could benefit their business. There is a sense among many of the smaller businesses that they are too small to take on an apprentice and this needs to be tackled if apprenticeships are to thrive in the sector locally. One way this could be achieved is to explore how micro-businesses could “share” apprentices to reduce the burden on sole traders and very small businesses, while increasing the experiences of apprentices across a number of different businesses / trades.

The stakeholders generally have a deep understanding of the apprenticeship schemes in place across the whole of Wales and value the positive contribution of apprentices to the sector. There are however, a number of ways they identify that the apprenticeship programme could be developed to increase the benefits further within the sector in West Wales:

- Firstly they highlight the need for apprenticeship schemes to be more tailored, flexible and relevant to learners and state that this could be achieved through better communication between the college and businesses. This includes the need for better communication throughout apprenticeships to ensure issues such as poor attendance, timeliness etc are shared with the college and dealt with as well as actively involving businesses in the development of the curriculum and learning pathways. There is also a suggestion that Tutors receive ongoing CPD on real world construction projects to ensure that they are able to empathise with the challenges facing businesses in the area.
- Secondly, they feel that there is a need to change the perception of the construction industry as being for less academic learners. The sector needs to attract a range of learners, including more women. To achieve this, there needs to be greater education about the sector and the opportunities it offers and for this to be shared with children much earlier in their education. They also suggest targeting 16-18 years olds with taster sessions and more

opportunities for work placements. They feel that the selection process needs to be more rigorous in order to deliver the types of students businesses need; motivated, committed and engaged. They suggest the development of promotional materials such as good news stories and case studies with learner experiences to promote the sector and create positive, and relevant messages.

- Thirdly, they highlight the opportunities that technology can offer students in terms of accessing content and training suggesting that the internet facilitates working with other learning institutions to get around the issue of lower numbers of students/learners in rural areas.
- Fourthly, they suggest that offering modular courses in specialist skills could help to increase and upskill those already working in the sector, and help address the issue of specialist skills shortages. Stakeholders suggest that the limited number of courses offered at Coleg Ceredigion is contributing to declining student numbers.

### 3.4. Links between Industry and the Education Sector

#### 3.4.1. The current situation

Almost two thirds of the businesses interviewed (60%) say that they would not know where to go to get advice on taking on students and apprentices, highlighting the divide that currently exists between the education and construction sectors. Many also state that they have not even considered approaching the college to help them address skills needs within their business.

Many of the students have family members in the trade and so looked for apprenticeships within existing networks and indeed many of the businesses consulted said that they had taken on apprentices that they already knew. The issue is for those that don't have an immediate link with the sector. One student highlighted the difficulty of finding a suitable company to take him on, stating that he was not really using his learned skills on a daily basis in his role. This sort of situation compounds issues around low achievement, high dropout rates and skills shortages as willing apprentices are not being challenged and progressing through the work place as they should.

At present those links between the college and the sector are missing and need to be built to secure the future relationship and improve the college's course offerings. Not only will this increase opportunities but it will help to ensure that courses meet the needs of both learners and businesses.

#### 3.4.2. Relationship with Industry: The Future

Businesses suggest a number of different activities that they feel would be beneficial in encouraging closer relationships between industry and the college:

- **Open days for businesses at the college** – particularly trying to develop relationships with smaller businesses who feel less engaged with the education sector and are less aware of the opportunities for their business. There is a distinct feeling that the college is actively engaged with larger businesses, but that small businesses are not on the radar

- **Promotion of apprenticeships within the sector** – especially at those businesses that haven't taken apprentices on before / wouldn't think of doing so
- **Working with businesses** – to create better communication between the college and businesses, raise awareness of the apprenticeship courses and improve dialogue between placement tutors and the SMEs to ensure both parties benefit from the apprenticeship
- **Understanding and recognising the needs of businesses** – developing students that are equipped for the workplace with basic industry and life skills and having discussions about how the course schedule could be better planned to fit around businesses
- **Direct communications with businesses i.e. mailshots** – to develop relationships with those businesses not already on the college radar
- **Open events at trades stores** – i.e. Screw fix, Jewson's etc. to create a visual presence where the smaller trades go for supplies

The stakeholders echo these ideas, highlighting the need for better communication between the college and businesses in order to tailor courses and make them flexible and relevant. They also emphasise the positive benefits of close links with industry particularly in terms of developing good work ethic, adherence to high standards, commercial realities, codes of conduct, professionalism and high standards of customer service. One stakeholder recommends working more closely with CITB to create stronger links with businesses. These close links will in turn support more proactive recruitment of work experience placements and keep the college front of mind for businesses looking to recruit new employees / apprentices.

Overall it is felt that these sorts of developments will help improve learner experiences and outcomes, as well as delivering a well-equipped and skilled junior workforce.

### 3.5. Key Themes & Conclusions

The research demonstrates that while there are successful elements of the apprenticeship programme delivery, overall it could be substantially improved with a more joined up and co-ordinated approach between the construction and education sectors.

The consultation identifies 3 key areas that require development:

- Skills shortages
- Readiness for work
- Relationship Building

#### A. Skills shortages

Significant proportions of business that are experiencing skills shortages, say that they are looking for specialist skills to join their company, they are usually looking for experience and an ability to take on work unsupervised alongside these skills. There appears to be a substantial gap between what the industry needs right now and the supply of these skills. While apprenticeships and specialist courses will not address this need immediately, they will ensure that the supply of these skills is available into the future. However, there needs

to be something that bridges the gap, helping young entrants to the sector develop these specialist skills so that they are able to fill the business needs. Stakeholders suggest the introduction of specialist modules to the curriculum, enabling the existing workforce to upskill and offering greater choice to new learners.

Businesses, however, also stress the need for solid, basic skills in their new recruits. Apprentices need to have a basic but sound understanding of construction techniques and tools before entering the workplace. The research also highlights that new entrants to the workplace are lacking basic skills, both personal and sector related, which slows their progress at work. Many businesses are experiencing poor levels of education in their new, young recruits and stress that numeracy and language skills are essential for the work place and that these need to be improved in order to increase work-readiness.

This is fundamental and ensures that the concept of taking on apprentices works well for businesses; they can be assured that new recruits will have all the basics in place and be able to start simple tasks straight away.

## B. Work Readiness

With the majority of businesses that have taken on apprentices saying that they have not been very well-equipped for the workplace (average score is 5.3 out of 10), there is certainly more that can be done to prepare learners for their placements. Work readiness ties in closely with skills shortages, and business again highlight a lack of basic skills as the biggest issue with new recruits in terms of being ready for work.

Most notably, businesses suggest that better levels of:

- Basic education – numeracy, language skills / communication and problem solving
- Basic construction skills, and
- A sound understanding in the use of basic tools

would significantly improve the work-readiness of the apprentices they take on.

Businesses also identify that beginning work is quite a culture shock for many young people, particularly in the construction sector where they will be expected to work long hours and in all weathers. A certain attitude, willingness to learn and reliability are essential attributes and it is felt that the college can and should do more to prepare students for the realities of the construction sector.

For the apprentices to reach their potential and maximise the benefits for both themselves and the businesses, students must gain these skills prior to entering the workplace. With this foundation in place, they will be better equipped to deal with the other demands of the workplace and successfully complete their training.

### C. Building Relationships

The sector in West Wales is dominated by small construction firms and yet they don't feel as though they have a relationship with the education sector. It is assumed by the firms interviewed that larger companies do, but the research highlights that at present the micro businesses have little-to-no engagement with the college. They are keen to see this change and would welcome opportunities to work with the College.

There is plenty of scope for greater interaction between businesses and the college. Suggestions for **employer-led steering groups** to help shape the curriculum with the needs of businesses in mind, **open days** to encourage greater interaction between the college and businesses and **direct communications with businesses** are all suggested as ways to increase engagement with the sector.

There is also a recognition that deepening relationships with key stakeholders across West Wales could help to ensure that Coleg Ceredigion's offering is in line with wider trends and priorities for the sector, keeping it both relevant and front of mind for organisations working in the sector on a daily basis.