Overview of TAE Landscape Study

OBJECTIVES

1. Collect baseline information on Training & Adult Education (TAE) sector
2. Inform government policies and initiatives on TAE practices and TAE sector development

RQ1	Kinds of TAE providers and their key characteristics and business model
RQ2	TAE professionals and their profiles
RQ3	Beliefs and practices in designing, developing and delivering TAE programmes
RQ4	Challenges
RQ5	Perception of TAE-related policies and initiatives and impact on their practices and development

Participants

1. TAE Providers (n=326)

Training organisations and companies that TAE professionals work in. They provide adult continuing education and training as main business, but exclude: enrichment or tutoring centres, music/art schools, private education institutions that offer pre-employment education and degree program, and sports training.

CEOs or Top Management Representatives:

a. Associations & Professional Bodies' Training Arms/ Functions
b. Business Consulting Training Organisations
c. Company Training Units
d. Post Secondary Institutions such as polytechnic, ITE, Universities
e. Private Education Institutes
f. Public Sector Training Institutions such as Civil Service College
g. WSQ Approved Training Organisations

2. TAE Professionals

AE (n=535)

ADULT EDUCATION

Adult Educators:
Involved in direct activities of development and training for the continuing education and training of the workforce, which may include analysis, design, development, facilitation and assessment.

TM (n=252)

TRAINING MANAGEMENT

Training Managers:
Manage a training institution which includes the management of programmes, curriculum, assessment, training resources, manpower, learning systems, quality assurance, compliance and administration.

HRD (n=138)

HUMAN RESOURCE DEVELOPMENT

Human Resource Developers:
Involved in the design and conduct of research to inform practice and policy formulation, development and implementation of competency frameworks and models, courseware quality accreditation and audit and employment facilitation.

Outline

Profile of Training Providers » **Profile of Adult Educators** » **Challenges**

Respondent Profile of TAE Providers (n=326)

PRIVATE
82.8% (n=270)

- Non-WSQ TPs: 34.5% (n=112)
- WSQ TPs: 25.5% (n=83)
- Private education institutes: 11% (n=36)
- Business training consultancies: 8.9% (n=29)
- Other government-endorsed TPs: 1.5% (n=5)
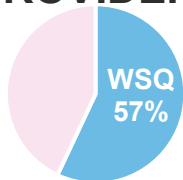- Associations and professional body training arms:1.5% (n=5)

PUBLIC
6.4% (n=21)

- TAE centres in IHLs 3.4%, (n=11)
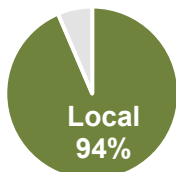- Public Sector Education Institutions 3.1%, (n=10)

IN-HOUSE
10.7% (n=35)
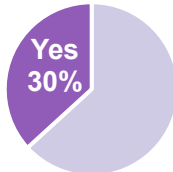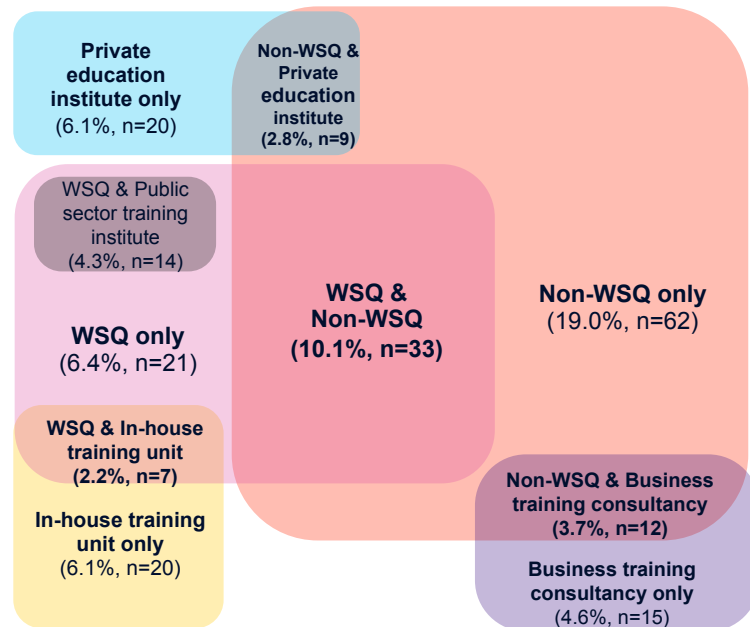
- Company training units 10.7% (n=35)

We found 88 combinations of different TP categories and presented those with more than 5 TPs in this graph. Many training providers fell into more than one category, e.g. 11 TAE centres in IHLs were scattered across the different groups.

WSQ PROVIDER

WSQ 57%

LOCAL OWNERSHIP

Local 94%

INTERNATIONAL PRESENCE

Yes 30%

Private education institute only (6.1%, n=20)

Non-WSQ & Private education institute (2.8%, n=9)

WSQ & Public sector training institute (4.3%, n=14)

WSQ only (6.4%, n=21)

WSQ & Non-WSQ (10.1%, n=33)

Non-WSQ only (19.0%, n=62)

WSQ & In-house training unit (2.2%, n=7)

In-house training unit only (6.1%, n=20)

Non-WSQ & Business training consultancy (3.7%, n=12)

Business training consultancy only (4.6%, n=15)

About 95% of the TAE organisations were SMEs, which hired less than 200 employees or with an annual turnover of not more than 100 million.
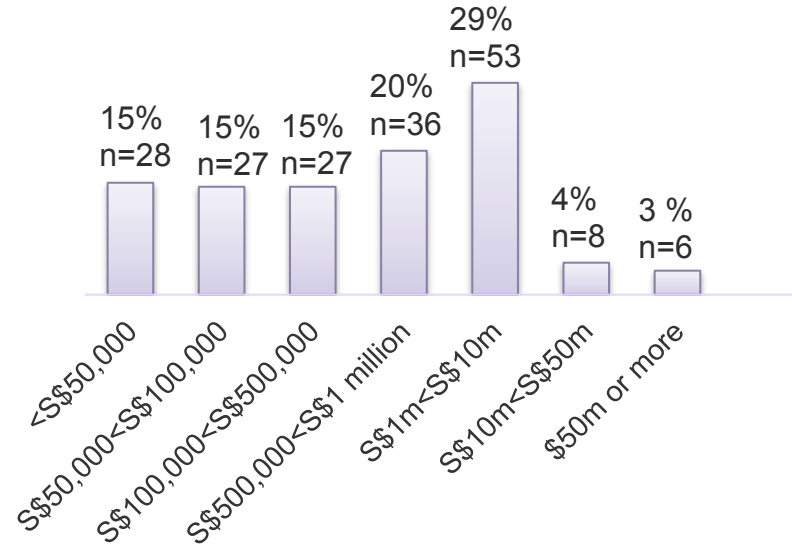
Firm Size

1 - 9	10 - 49	50 - 99	100-199	≥ 200
46% (n=108)	36% (n=85)	10% (n=23)	3% (n=7)	5% (n=13)

Revenue

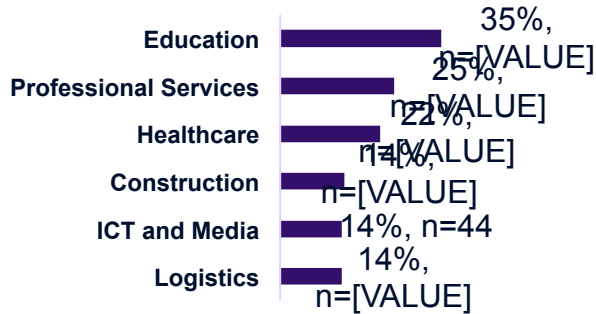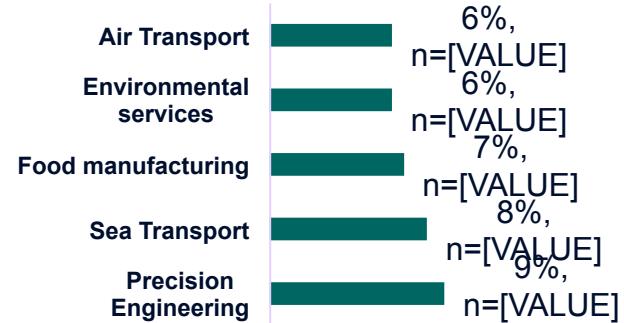| <S$50,000	S$50,000<S$100,000	S$100,000<S$500,000	S$500,000<S$1 million	S$1m<S$10m	S$10m<S$50m	$50m or more
15% n=28	15% n=27	15% n=27	20% n=36	29% n=53	4% n=8	3 % n=6
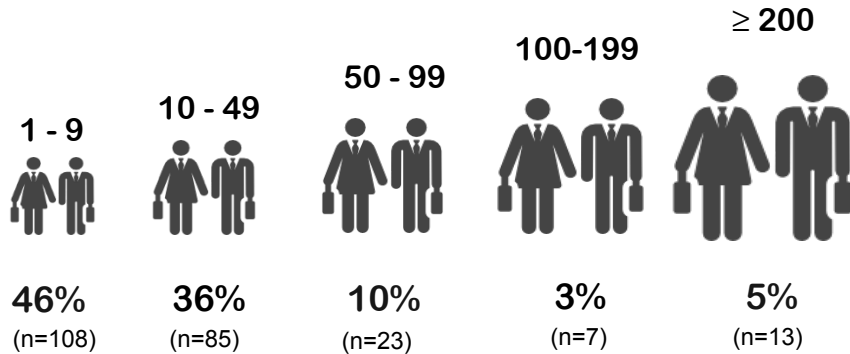
Education Sector topped the industry TP Respondents serve with 77% of them offering generic skills training

Industry Distribution of TP Respondents

Top 5 Industries

- Education — 35%, n=[VALUE]
- Professional Services — 25%, n=[VALUE]
- Healthcare — 22%, n=[VALUE]
- Construction — 14%, n=[VALUE]
- ICT and Media — 14%, n=44
- Logistics — 14%, n=[VALUE]

Bottom 5 industries

- Air Transport — 6%, n=[VALUE]
- Environmental services — 6%, n=[VALUE]
- Food manufacturing — 7%, n=[VALUE]
- Sea Transport — 8%, n=[VALUE]
- Precision Engineering — 9%, n=[VALUE]

Skills Domain

- Occupational — 62%
- Industry-specific — 40%
- Generic — 57%
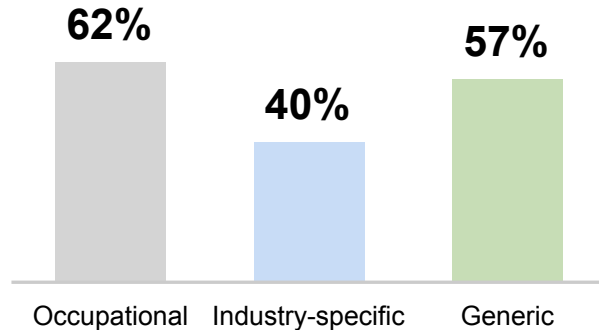
Training Products and Service by Course Type

[CATEGORY NAME] Course
[CATEGORY NAME] Course
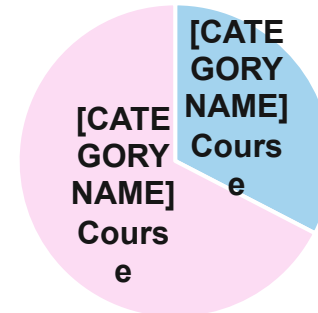
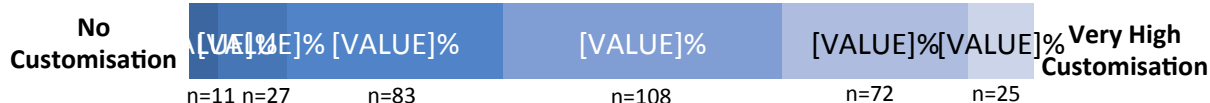# 1/3 of TPs were doing better than average in all four aspects of Business Strategy, compared to 15% doing least in all four aspects.

How often does your organisation *lead the way* in terms of developing new products and services?
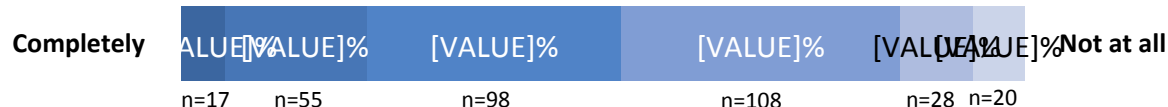
Not at all — Always

6%	11%	30%	31%	19%	4%
n=20	n=35	n=96	n=100	n=63	n=12

How much does your organisation *customise its products and services* to the client's needs?

No Customisation — Very High Customisation

[VALUE]%	[VALUE]%	[VALUE]%	[VALUE]%	[VALUE]%	[VALUE]%
n=11	n=27	n=83	n=108	n=72	n=25

To what extent are *learning technologies* in your organisation up-to-date?

Well behind recent developments — State of the arts

[VALUE]%	[VALUE]%	[VALUE]%	[VALUE]%	[VALUE]%	[VALUE]%
n=8	n=37	n=111	n=103	n=60	n=7

How *dependent on price* are your organisation's products or services to gain competitive success?

Completely — Not at all

[VALUE]%	[VALUE]%	[VALUE]%	[VALUE]%	[VALUE]%	[VALUE]%
n=17	n=55	n=98	n=108	n=28	n=20

15% at risk

1/3 market leaders

Who may be at risk?

o **90% were Micro-SMEs with revenue less than $1million**

o **55% with less than 10 employees**

o **Majority had no processes in place to identify "high potential" or talented individuals**

Who are the market leaders?

o **Bigger TPs with at least 50 employees and more than 10 million revenue**

o **Cover industries such as food services, healthcare, ICT & media, retail, real estate**

17% of TP Respondents reported they expect more than 10% increase in revenue in the next 12 months though 19% experienced a revenue drop in the last 12 months
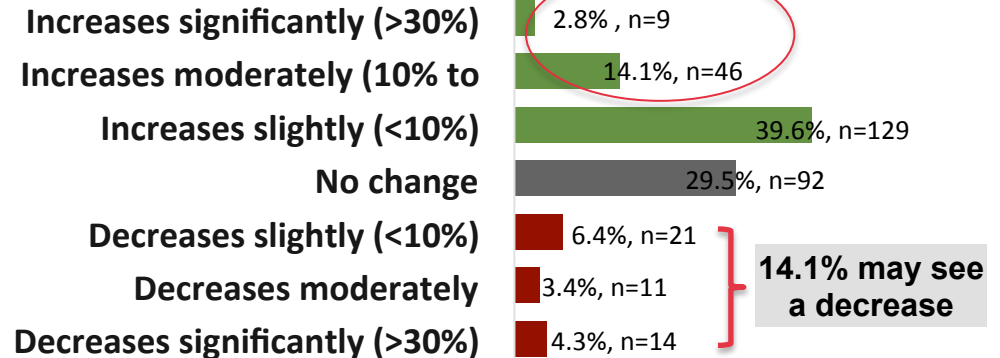
Business Performance
In the last 12 months,

	Decreased	No change	Increased
Profitability	19.3%	30.7	**50%**
Total sales	18.1%	28.2%	**53.7%**
Market share	13.8%	44.2%	**41.4%**
Staff strength	14.4%	44.2%	**41.4%**
Client satisfaction	5.2%	30.7%	**64.1%**
Spending on innovation and technology	8.3%	40.8%	**50.9%**
Employees learning new skills	5.2%	41.7%	**53.1%**
Revenue	19.2%	28.2%	**52.6%**

- Over half of the TAE providers reported increases in terms of revenue, profitability, total sales, client satisfaction, spending on innovation and technologies, and employees learning new skills.

- Only less than 15% of the TAE providers would expect some decrease in revenue. Over half of them was with less than 10 employees.
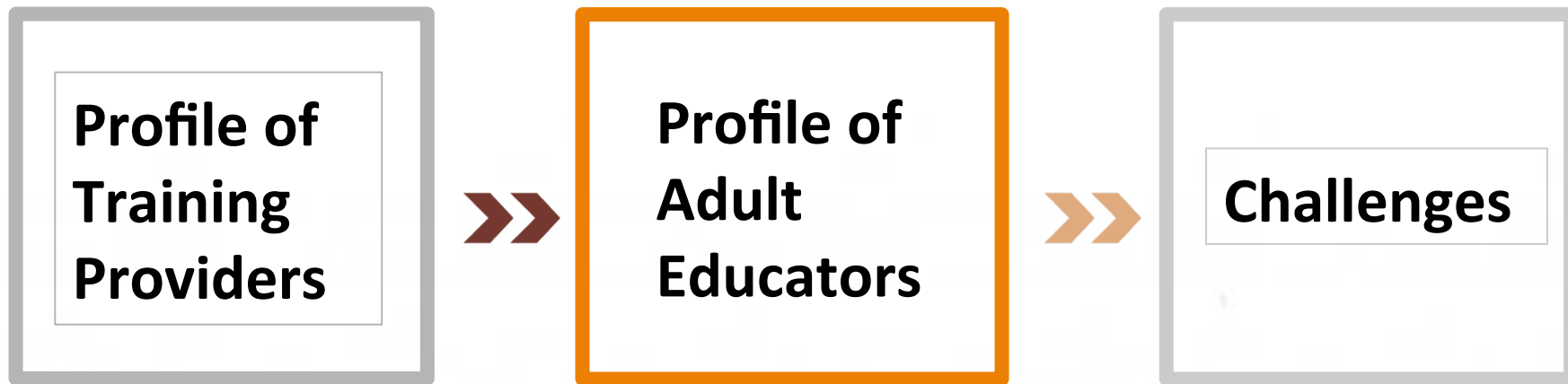
Business Outlook
In the next 12 months, revenue

Increases significantly (>30%) — 2.8% , n=9

Increases moderately (10% to — 14.1%, n=46

Increases slightly (<10%) — 39.6%, n=129

No change — 29.5%, n=92

Decreases slightly (<10%) — 6.4%, n=21

Decreases moderately — 3.4%, n=11

Decreases significantly (>30%) — 4.3%, n=14

14.1% may see a decrease

Functional Roles

Training facilitation/ lecturing
79.1%

Curriculum & learning resources development
45.4%

Assessment
47.7%

70.8% of AEs performed multiple job roles

Training/learning needs analysis
33.8%

Administration to facilitate courses & accreditation
34.1%

Industry-related roles
5.2%

Learning & performance consultancy
25.2%

Others
4.1%

Top Combinations for AEs with major role in "training facilitation"

Training Facilitation **+**

- **Assessment** (53.4%, n=141)
- **Curriculum development** (42.8%, n=113)
- **Training/learning needs analysis** (26.9%, n=71)
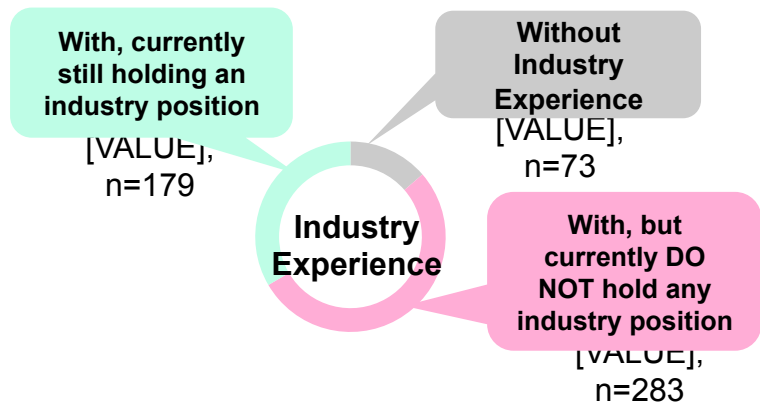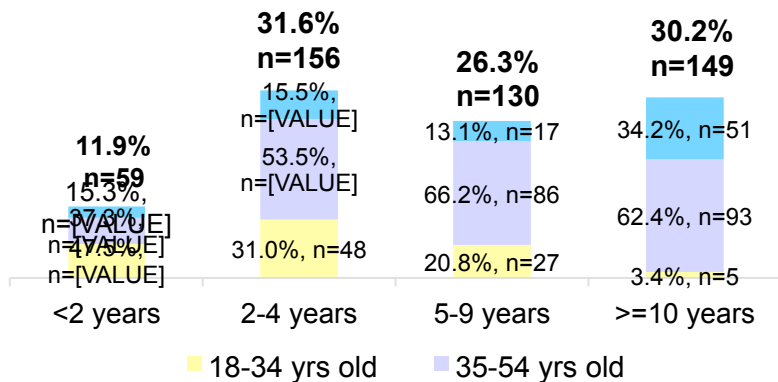
Types of Adult Educators (AEs)

2 Main Types of AEs, based on *Level of Training Involvement*

Type of AE	Full-Timers **40.8% (n=218)** + Freelancers **29.5% (n=158)** = **70.3% (n=376)**		Industry Practitioners **21.5% (n=115)**
Training Involvement	Training is **Primary Role**		Training is **Secondary Role**
Work Arrangement	Hold a **Full-time** position in a TAE company, including business owners or sole proprietors	Hold a part-time position or contracted as a **Freelancer** or adjunct in a TAE company	Hold an industry position and doing TAE related work, including in-house trainers

Note: There were 44 AEs were categorized as "others": e.g., retired, currently not working but seeking for TAE related work, maternity leave, etc

Adult Educators' Work Experience

Majority of the Adult Educator Respondents were quite experienced, with more than 4/5 of them having working experience in other sectors or are currently still doing some industry related work. However, the currency of their domain knowledge may be a concern.
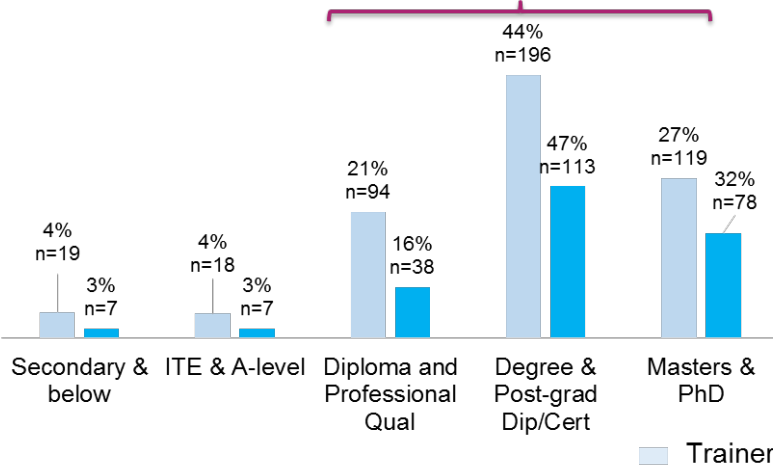
TAE Work Experience by Age Group

With, currently still holding an industry position [VALUE], n=179

Without Industry Experience [VALUE], n=73

Industry Experience

With, but currently DO NOT hold any industry position [VALUE], n=283

- 18-34 yrs old
- 35-54 yrs old

	Overall	Full-Timers	Part-time / Freelancers	Industry Practitioners
Years in TAE sector (mean)	7.7 years	7.7 years	8.4 years	6.7 years
% of AE with Industry Experience	86.4%	78.9%	88.0%	100%

Qualifications of Adult Educators

Overall, Adult Educator Respondents were highly educated and pedagogically qualified, in terms of academic and training qualifications obtained.
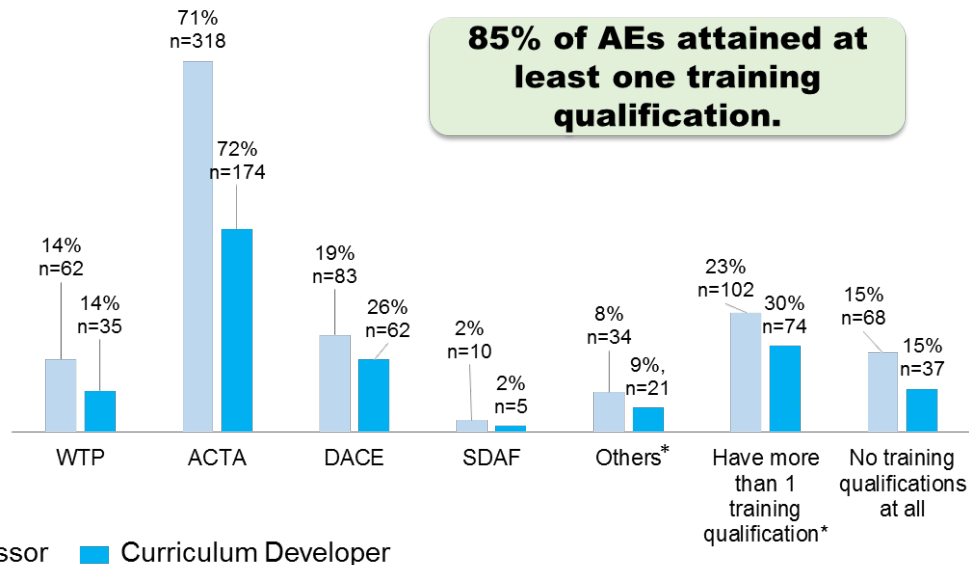
HIGHEST QUALIFICATION ATTAINED

Over 90% of AEs are PMEs

- Secondary & below: 4% n=19 / 3% n=7
- ITE & A-level: 4% n=18 / 3% n=7
- Diploma and Professional Qual: 21% n=94 / 16% n=38
- Degree & Post-grad Dip/Cert: 44% n=196 / 47% n=113
- Masters & PhD: 27% n=119 / 32% n=78

AE TRAINING QUALIFICATION* ATTAINED

85% of AEs attained at least one training qualification.

- WTP: 14% n=62 / 14% n=35
- ACTA: 71% n=318 / 72% n=174
- DACE: 19% n=83 / 26% n=62
- SDAF: 2% n=10 / 2% n=5
- Others*: 8% n=34 / 9%, n=21
- Have more than 1 training qualification*: 23% n=102 / 30% n=74
- No training qualifications at all: 15% n=68 / 15% n=37

□ Trainer/Assessor   ■ Curriculum Developer

Note: *Training qualifications include Workplace Training Programme (WTP), the Advanced Certificate in Training and Assessment (ACTA), Diploma in Adult and Continuing Education (DACE); and the Specialist Diploma in Advanced Facilitation (SDAF) for training facilitators, or equivalent qualifications.
Other training qualifications include: Graduate diploma in teaching and development, IATA instructor certificate, Certified Workplace Learning Specialist, etc
Trainer/Assessor & Curriculum Developer top combinations for those have more than 1 training qualification: ACTA + DACE, WTP + ACTA, ACTA + Others

Skills Proficiency of Adult Educators

Consistent across all three groups of AEs, AEs appeared more proficient in generic skills and traditional classroom mode of training

1 = Not proficient, 2 = Somewhat proficient, 3 = Proficient, 4 = Slightly more proficient than required, 5 = Much more proficient than required

Subject fields
(mean=4)

Teamwork
(mean=3.9)

Communication
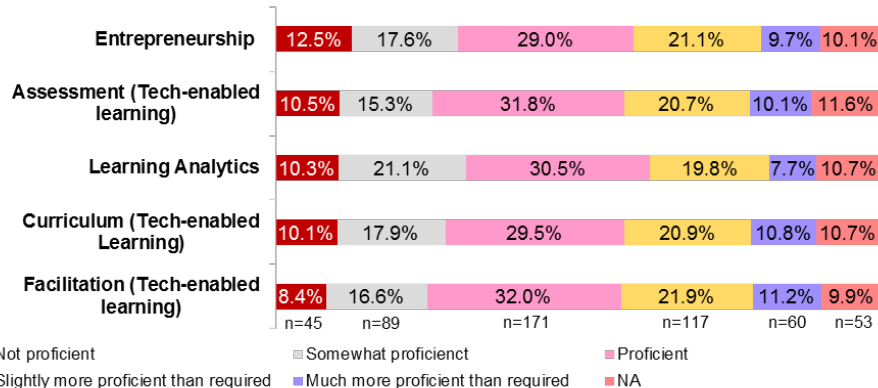**(mean=3.9)**

Problem-solving
(mean=3.9)

Facilitation (Classroom)
(mean=3.8)

LEAST SKILLED AREAS

Consistent across all three groups of AEs, AEs appeared least proficient in tech-enabled learning, entrepreneurship and learning analytics

	Not proficient	Somewhat proficient	Proficient	Slightly more proficient than required	Much more proficient than required	NA
Entrepreneurship	12.5%	17.6%	29.0%	21.1%	9.7%	10.1%
Assessment (Tech-enabled learning)	10.5%	15.3%	31.8%	20.7%	10.1%	11.6%
Learning Analytics	10.3%	21.1%	30.5%	19.8%	7.7%	10.7%
Curriculum (Tech-enabled Learning)	10.1%	17.9%	29.5%	20.9%	10.8%	10.7%
Facilitation (Tech-enabled learning)	8.4%	16.6%	32.0%	21.9%	11.2%	9.9%
	n=45	n=89	n=171	n=117	n=60	n=53

- Not proficient
- Somewhat proficienct
- Proficient
- Slightly more proficient than required
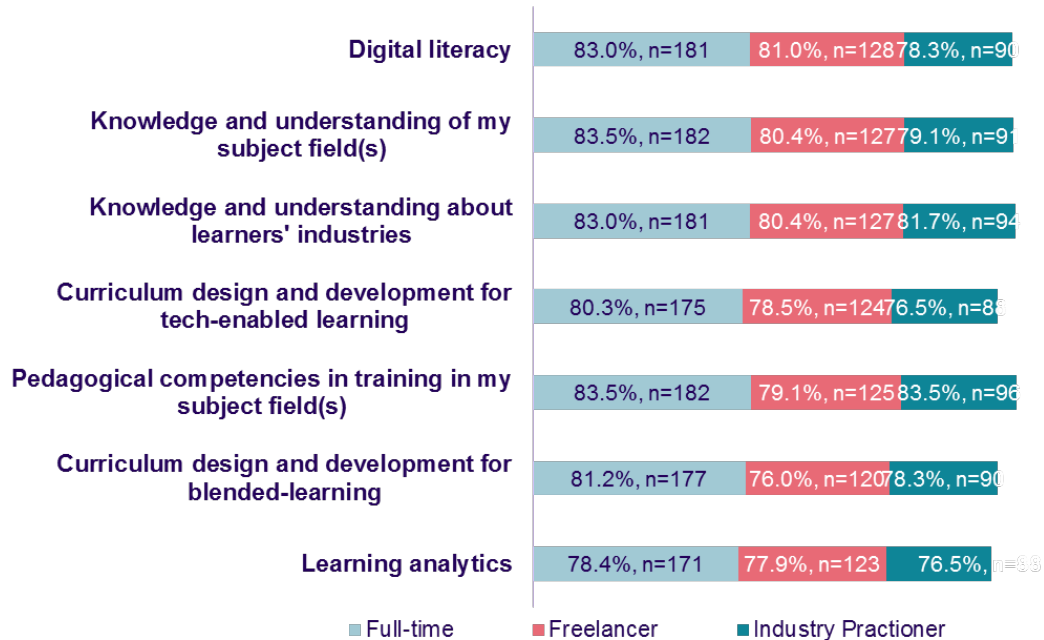- Much more proficient than required
- NA

Who were these less proficient AEs?

- Industry practitioners or AEs working in IHLs were least proficient in entrepreneurship and learning analytics
- AEs with Private TPs appeared least proficient in tech-enabled learning
- About 30% had more than 10 years of working experience in the TAE sector

15

AE Professional Development Needs and Preference

TOP PROFESSIONAL DEVELOPMENT NEEDS

Need	Full-time	Freelancer	Industry Practioner
Digital literacy	83.0%, n=181	81.0%, n=128	78.3%, n=90
Knowledge and understanding of my subject field(s)	83.5%, n=182	80.4%, n=127	79.1%, n=91
Knowledge and understanding about learners' industries	83.0%, n=181	80.4%, n=127	81.7%, n=94
Curriculum design and development for tech-enabled learning	80.3%, n=175	78.5%, n=124	76.5%, n=88
Pedagogical competencies in training in my subject field(s)	83.5%, n=182	79.1%, n=125	83.5%, n=96
Curriculum design and development for blended-learning	81.2%, n=177	76.0%, n=120	78.3%, n=90
Learning analytics	78.4%, n=171	77.9%, n=123	76.5%, n=88

■ Full-time ■ Freelancer ■ Industry Practioner

TOP PREFERRED PROFESSIONAL DEVELOPMENT ACTIVITIES

Courses / workshops
71.5%, n=343

Conferences
42.7%, n=205

Visits to understand best practice
33.1%, n=159

Reasons for Joining the TAE Sector

1 **Passion stood out to be the key reason why most AEs joined the TAE sector.**
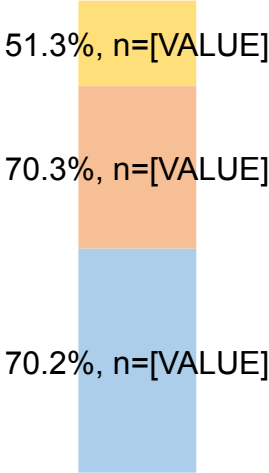
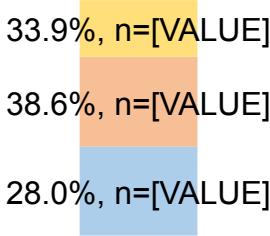**2** **It seemed AEs view TAE as an open industry that offered opportunities for second career and work-life balance.**

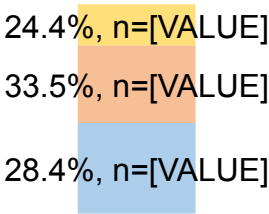**3** **Good pay was not viewed as a big incentive.**

Passion for TAE
64.5%
(n=345)

To expand and diversify skills & knowledge
40%
(n=214)
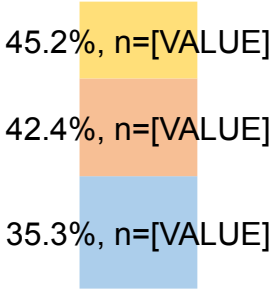
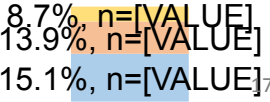Had the credentials / qualifications for TAE
32.5%
(n=174)

Career switch
29.9%
(n=160)

Flexible working hours
29.3%
(n=157)

Good pay
12.5%
(n=67)

51.3%, n=[VALUE]

70.3%, n=[VALUE]

70.2%, n=[VALUE]

45.2%, n=[VALUE]

42.4%, n=[VALUE]

35.3%, n=[VALUE]

33.9%, n=[VALUE]

38.6%, n=[VALUE]

28.0%, n=[VALUE]

24.4%, n=[VALUE]

33.5%, n=[VALUE]

28.4%, n=[VALUE]

25.2%, n=[VALUE]

50.6%, n=[VALUE]

17.0%, n=[VALUE]

8.7%, n=[VALUE]
13.9%, n=[VALUE]
15.1%, n=[VALUE]

Outline

| Profile of Training Providers | » | Profile of Adult Educators | » | Challenges |

Top business challenge in the TAE sector was difficulty in establishing partnerships, 38% reported multiple challenges in tapping TAE related policies/initiatives while 57% reported multiple challenges in organizing PD actitivies.

Top Business Challenges

		All TP Respondents
	Difficult to establish partnerships	45%
	Training is not a priority in enterprises	32%
	Individual learners lack motivation for training	31%
	No challenge at all	17%

Top challenges in tapping on TAE related policies/ initiatives	
Time consuming	31%, n=99
Complicated application process	24%, n=78
Difficulty meeting the criteria	22%, n=73
Lack of information available	21%, n=69
Having multiple challenges	38%, n=124
No challenges faced	40%, n=129

Top challenges in organising staff PD activities	
Lack of fund for training/training too expensive	40%, n=116
Not able to space more staff time	37%, n=108
Hard to find time to organise training	29%, n=84
Difficulty finding training providers who can deliver training where and when as we want it	22%, n=63
Having multiple challenges	57%, n=165
No challenges faced	23%, n=66

Note: Other challenges include examples such as 'trainers are not well educated', 'not enough resource to invest in technology' and 'market competition'

Top challenges that Adult Educators encountered were competitive and changing market, uncertain career trajectories and lack of access to professional development; almost half of them had multiple challenges tapping on TAE related policies/initiatives.

TOP CHALLENGES

	All AE respondents	Full-time	Freelance	Industry practitioner
Competitiveness in the training market	46%	38%	57%	45%
Career trajectories are uncertain	41%	43%	43%	37%
Difficulty in responding to the changes in TAE market	34%	44%	23%	34%
Lack of work-life balance	32%	37%	22%	33%
Lack of access to professional development	31%	30%	24%	45%
No challenge	16%	14%	15%	20%

Top challenges in tapping on TAE related policies/ initiatives

Time consuming	38%, n=153
Lack of available infomation	35%, n=139
Difficulty in meeting criteria	25%, n=101
Multiple challenges	48%, n=193
No challenges faced	25%, n=133

Top challenges in Professional Development

Professional development conflicts with work schedule	52%, n=276
Professional development is too expensive	52%, n=276
No incentive for PD participation	43%, n=230
No challenges faced	18%, n=97

Note: Other challenges include examples such as 'lack of access to continuous flow of work', 'difficulty in establishing and/or maintaining networks' and 'difficulty in understanding and/or adapting to policies/requirements'

Summary

Profile of TP Respondents

➢ Overall, about 95% of the TAE providers were SMEs

➢ Close to 2/3 were Micro-SMEs

➢ Around 1/3 of TP Respondents were market leaders, while about 15% may be at risk

➢ Over half reported increase in business and have positive outlook for the next 12 months

Profiles of Adult Educators

➢ Over 70% of AEs performed multiple roles in their work.

➢ Adult Educators seemed to be qualified in both academic qualifications and training qualifications. At least 2/3 were well-matched in their training qualification requirements.

➢ AEs' least skilled areas remained in tech-enable learning.

➢ AEs were quite passionate about working in the TAE sector.

Top Challenges faced by TP Respondents

➢ Difficulty in establishing partnership

➢ Training was not valued by enterprises and individuals

➢ Difficult to meet criteria or access information to tap on government initiatives

➢ Too costly to train their own staff

Top Challenges faced by AE Respondents

➢ Competitive and changing market

➢ Uncertain career trajectories

➢ Lack of access to professional development

➢ Multiple challenges in tapping on TAE related policies / initiatives

Acknowledgement

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