Training and Adult Education (TAE) Landscape in Singapore – Profile and Challenges of the TAE Providers and Adult Educators

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Introduction

As part of Singapore's efforts to address challenges ahead, the SkillsFuture initiative was launched to provide Singaporeans with the opportunities to develop their fullest potential throughout life for a future advanced economy and inclusive society, through skills mastery and lifelong learning. In this national movement, the Training and Adult Education (TAE) sector plays a critical role in developing the skills capabilities and mastery of the workforce. As key players of the TAE sector, TAE providers as well as the adult educators need to stay relevant and responsive to the rapid change of the economy and the changing needs of the industry in order to meet the continuing demand for quality education, learning and development in Singapore.

This paper presents findings from the Training and Adult Education (TAE) Landscape Survey to provide baseline information on the profiles of the training providers and adult educators as well as challenges they faced in their practice. Specifically, we address the following research questions:

RQ1: What are the profiles of the training providers, in terms of their firm size, revenue and business strategies?

RQ2: What are the profiles of the adult educators, in terms of their functional roles, experience, qualifications and skills?

RQ3: What challenges do training providers and adult educators encounter?

Participants

TAE providers. TAE providers are the 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. 326 CEOs or representatives of senior management from the TAE providers responded to our survey. Details of their profiles are presented in the results section.

Adult educators (AEs): AEs are involved in direct activities of development and training of the workforce, which may include learning and needs analysis, curriculum design and development, facilitation, assessment and learning consultancy. 535 AEs responded to our survey.

Results

1. ***Profile of Training Providers***

1a. Majority of (83%) TAE provider respondents are Private training providers

TAE providers offer a wide range of programmes, covering both private and public sector and stretch from PET (Pre-employment Training) to TAE. Of the 326 training providers participated in our survey, 82.8% (*n* = 270) of them were Private training providers, 6.4% (*n* = 21) of them were public training providers, including TAE centres in and affiliated to the Institutes of Higher Learnings (IHLs) and public sector education institutions. 10.7% (*n* = 35) of the respondents were in-house training providers. See Figure 1.

Figure 1: Types of training providers

Private
82.8% (*n* = 270)

- Non-WSQ training providers: 34.5% (*n* = 112)
- WSQ training providers: 25.5% (*n* = 83)
- Private education institutes: 11% (*n* = 36)
- Business training consultancy organisations: 8.9% (*n* = 29)
- Other government-endorsed training providers: 1.5% (*n* = 5)
- Associations and professional bodies training arms: 1.5% (*n* = 5)

Public
6.4% (*n* = 21)

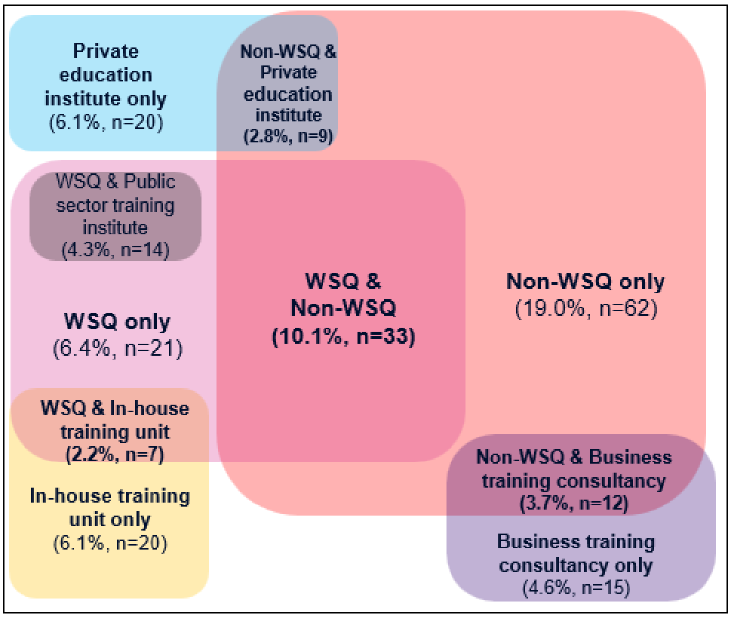
- TAE Centres in IHLs: 3.4%, (*n* = 11)
  Public Sector Education Institutions: 3.1% (*n* = 10)

In-House
10.7% (*n* = 35)

- Company training units: 10.7% (*n* = 35)

However, many training providers identified that they fell into more than one category. We found 89 combinations and presented those with more than 5 TPs in this graph. 11 TAE centres in IHLs were scattered across the groups. See Figure 2.

Figure 2: Combinations of TP categories



Among the TAE provider respondents, 94% were locally owned companies and 30% had international presence in other countries. 57% of them provided Workforce Skills Qualification (WSQ) products/services.

1b. 95% of the responded training providers were SMEs which hired less than 200 employees, and 2/3 of them were micro-SMEs with an annual turnover of less than S$1 million

Overall, about 95% of the responded training providers were small and medium enterprises (SMEs), which hired less than 200 employees. Close to half of the responded private training providers had less than 10 employees. See Table 1 below for the firm size for the different types of training providers.

Table 1: Firm size by type of training providers

	Firm size	Overall	Type of training providers		
			Public	**In-house**	**Private**
SMEs (95% of the overall TPs)	*1-9*	46% (*n* = 108)	21% (*n* = 4)	39% (*n* = 12)	**49%** (*n* = 93)
	10-49	36% (*n* = 85)	32% (*n* = 6)	43% (*n* = 12)	36% (*n* = 67)
	50-99	10% (*n* = 23)	11% (*n* = 2)	7% (*n* = 2)	10% (*n* = 19)
	100-199	3% (*n* = 7)	16% (*n* = 3)	0% (*n* = 0)	2% (*n* = 4)
Non-SMEs	*>=200*	5% (*n* = 13)	21% (*n* = 4)	11% (*n* = 3)	3% (*n* = 6)

Overall, about 64% of the responded training providers were Micro-SMEs, which had an annual turnover of less than S$1 million. 95% of the responded private training providers had an annual turnover of less than S$10 million. Table 2 presents the revenue of different types of training providers.

Table 2: Revenue by type of training providers

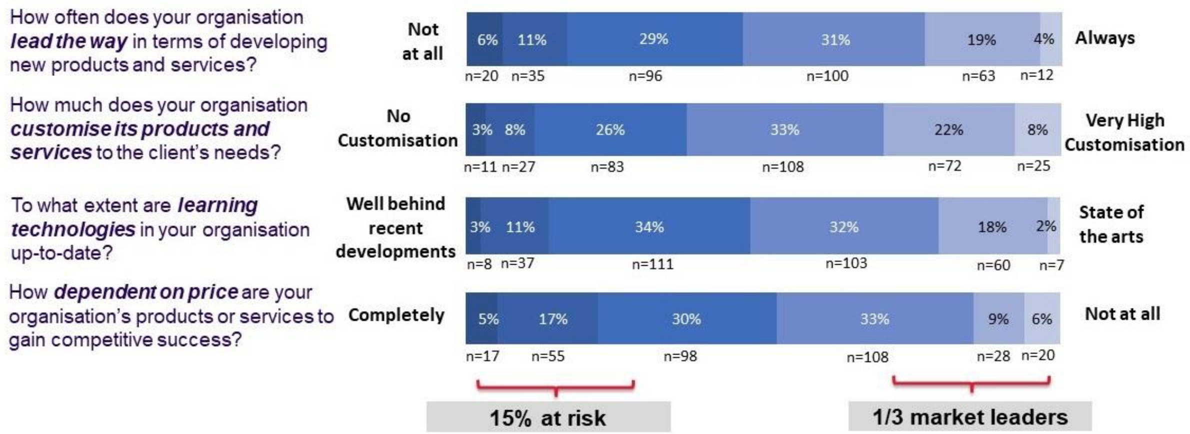
	Revenue	Overall	Type of training providers		
			Public	**In-house**	**Private**
Micro-SMEs (64% of the overall TPs)	*<S$50k*	15% (*n* = 28)	0% (*n* = 0)	5% (*n* = 1)	17% (*n* = 27)
	S$50k-<S$10k	15% (*n* = 27)	11% (*n* = 1)	19% (*n* = 4)	14% (*n* = 22)
	S$10k-<S$50k	15% (*n* = 27)	11% (*n* = 1)	10% (*n* = 2)	16% (*n* = 24)
	S$50k-S$1m	19% (*n* = 36)	0% (*n* = 0)	24% (*n* = 5)	20% (*n* = 31)
Non Micro-SMEs	*S$1m-<S$10m*	29% (*n* = 53)	22% (*n* = 2)	33% (*n* = 7)	28% (*n* = 44)
	S$10m-<S$50m	4% (*n* = 8)	33% (*n* = 3)	5% (*n* = 1)	3% (*n* = 4)
	S$50m or more	3% (*n* = 6)	22% (*n* = 2)	5% (*n* = 1)	2% (*n* = 3)

1c. 1/3 of the TAE provider respondents were doing better than average in all four aspects of business strategy, compared to 15% doing least in all four aspects.

1/3 of the TAE provider respondents were doing better than average, which adopted up-to-date technologies, led the way in developing new products, and highly customized their products and services to clients' needs. They were least dependent on price to gain competitive success. 15% of the

TAE provider respondents were doing least in all these four aspects, as they were highly dependent on price competition, rarely developed new products or services, with outdated learning technologies and little customization in their products and services. See Figure 3.

Figure 3: Business strategies of training providers



For those who were at risk, 90% of them were micro-SME with revenue less than S$1m and 55% of them had less than 10 employees. Majority of them had no processes in place to identify "high potential" or talented individuals. Contrastingly, the market leaders that were doing well than average in all four aspects tended to be bigger providers with at least 50 employees and more than S$10 million revenue. They covered industries such as food services, healthcare, ICT & media, retail, real estate etc. Over 60% of TAE centres in IHLs were market leaders.

1d. Over half of the training providers reported increases in business performances over the last 12 months and more than half of them expected increases in revenue over the next 12 months

Of the 326 surveyed training providers, more than half of them reported increases in terms of revenue, profitability, total sales, client satisfaction, spending on innovation and technologies, and employees learning new skills in the last 12 months, see Table 3.

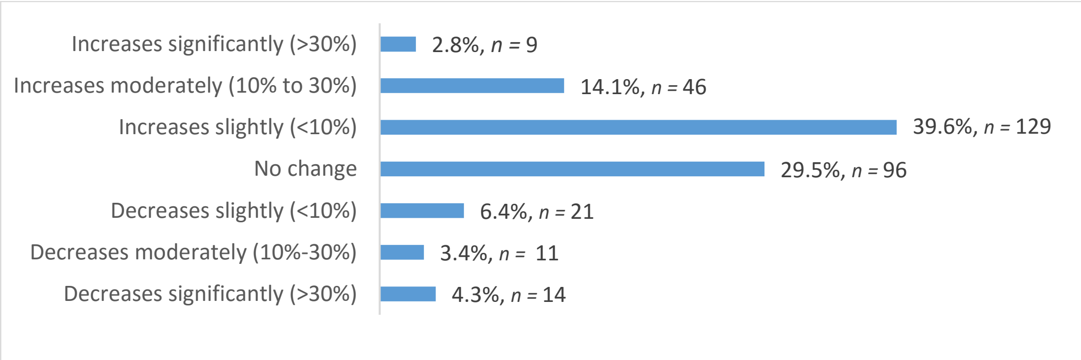
Table 3: Training providers' business performances over the past 12 months

	Decreased	No change	Increased
Profitability	19.3% (*n* = 63)	30.7 (*n* = 100)	50% (*n* = 163)
Total sales	18.1% (*n* = 59)	28.2% (*n* = 92)	53.7% (*n* = 175)
Market share	13.8% (*n* = 45)	44.2% (*n* = 144)	41.4% (*n* = 137)
Staff strength	14.4% (*n* = 47)	44.2% (*n* = 144)	41.4% (*n* = 135)
Client satisfaction	5.2% (*n* = 17)	30.7% (*n* = 100)	64.1% (*n* = 209)
Spending on innovation and technology	8.3% (*n* = 27)	40.8% (*n* = 133)	50.9% (*n* = 166)
Employees learning new skills	5.2%	41.7%	53.1%

	(*n* = 17)	(*n* = 136)	(*n* = 173)
Revenue	19.2% (*n* = 63)	28.2% (*n* = 92)	52.6% (*n* = 171)

More than half (56.5%, *n* = 184) of the 326 surveyed training providers expected increases in revenue over the next 12 months. Only less than 15% of the TAE providers would expect some decrease in revenue. See Figure 4.

Figure 4: Training providers' business outlook (revenue) over the next 12 months

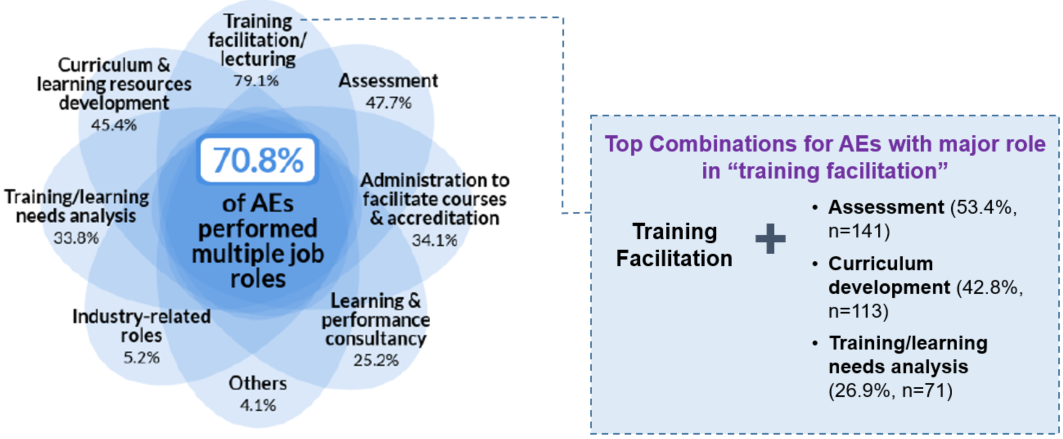


2. ***Profile of Adult Educators***

2a. Majority of adult educators (70.8%) performed multiple roles in their work.

Major functional roles that adult educators performed include: training facilitation, assessment, curriculum design and development, training/learning needs analysis, administration to facilitate courses and accreditation, learning and performance consultancy, etc. About 70% of AE respondents performed multiple roles in their work, see figure 5. For example, among the 79% of AEs that performed training facilitation as one of their functional role, half of them also performed as assessors, 43% with curriculum development roles and 27% also conduct training/learning needs analysis.

Figure 5: Functional roles of adult educators



2b. Among our AE respondents, about 40% were full-time AEs, 30% were freelancers who hold a part-time position or contracted as a freelance or adjunct in a TAE company, 22% were industry practitioners who hold an industry position and doing TAE related work as a secondary role.

Based on level of training involvement, adult educators were grouped into full-timer, freelance and industry practitioners. Full-time AEs were full-time employees of the company whose primary role is training, while freelance AEs were those who hold a part-time position or contracted as a freelance with training as their primary role. The third group or what we call industry practitioners were those who hold an industry position (including in-house trainers) and doing TAE related work as a secondary role. Among our AE respondents, 40.8% were full-time AEs, 29.5% were freelance, and 21.5% were industry practitioners. The rest 9% were categorized as "others": e.g., retired, currently not working but seeking for TAE related work, on maternity leave, etc.

2c. Majority of the AEs were quite experienced with an average of 7.7 years of working experience in the TAE sector. About 85% had working experience in other sectors other than TAE; however, only 1/3 still holding an industry position now.

Most AEs were quite experienced in the TAE sector. Only 11.9% (n = 59) of them had less than 2 years of working experience. 31.6% (n = 156) of them had 2-4 years of experience, 26.3% (n = 130) of them had 5-9 years of experience, and 30.2% (n = 149) of them had 10 years or more than 10 years of experience. See Figure 6 for the years of TAE working experience by age groups of AEs.

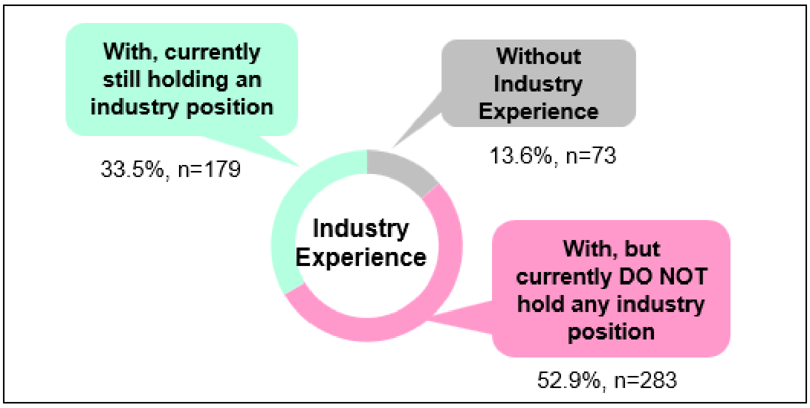
Table 4: Working experience of AEs

TAE working experience	19-34 years old	35-54 years old	55-84 years old
<2 years	47.5% (n=28)	37.3% (n=22)	15.3%, (n=9)
2-4 years	31% (n=48)	53.5%, (n=83)	15.5%, (n=24)
5-9 years	20.8% (n=27)	66.2%, (n=86)	13.1%, (n=17)
>=10 years	3.4% (n=5)	62.4%, (n=93)	34.2%, (n=51)

2d. Over 85% of AEs had working experience in other sectors but only 1/3 are currently still doing some industry related work; 1 in 6 AEs are at risk of not being current in their domain expertise

Of the 535 AEs surveyed, more than 85% of them had working experience in other sector previously or are currently still doing some industry related work. See Figure 6.

Figure 6: Industry experience of adult educators



2 out of 3 AEs do not have industrial experience or are currently not working in industries other than the TAE sector. 1 in 6 of the AEs do no hold an industry position currently and did not participate in training relating to their domain of expertise. This is a concern because AEs who lack domain currency may be unable to equip their learners with the relevant skills and practices required by their respective industries. For example, these AEs may not have access to or kept up with the emerging technological

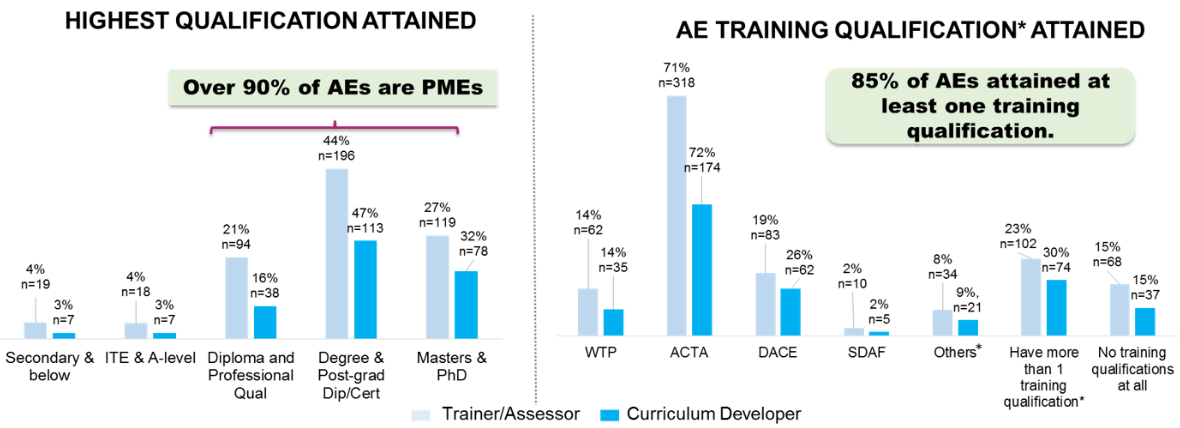
innovations used in the industries and thus would not be able to integrate these into their training content. More worryingly, among the 7.9% (41 out of 518) of AEs who already reported being weak in their domain expertise, 63.4% of them (n=26) also reported that they do not have industrial experience or are currently not working in industries other than the TAE sector. They are thus already weak in their domain and are also at risk of not being current in their domain in the long run.

2e. Majority of TAE professionals were highly educated and pedagogically qualified

Overall, adult educator respondents were highly educated and pedagogically qualified, in terms of academic and training qualifications obtained. Over 90% of AEs obtained diploma or higher education qualifications. See Figure 7.

Training qualifications reported 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. 85% of AEs attained at least one training qualifications. Of the curriculum developers who have more than one training qualifications, the top combinations of the qualifications are ACTA & DACE (10.3%, n = 46 and 14.8%, n = 36, respectively), WTP & ACTA (4.3%, n = 19 and 4.5%, n = 11, respectively) and ACTA & Others (2.5%, n = 11 and 3.3%, n = 8, respectively). For TMs (n = 252) who have more than one training qualifications, the top combinations of the qualifications are ACTA & DACE (7.5%, n = 19), WTP & ACTA (2.8%, n = 7), WTP & ACTA & DACE & SDAF (1.2%, n = 3) and ACTA & Others (1.2%, n = 3). Other training qualifications include Graduate diploma in teaching and development, IATA instructor certificate, Certified Workplace Learning Specialist, etc.

Figure 7: Qualifications of adult educators

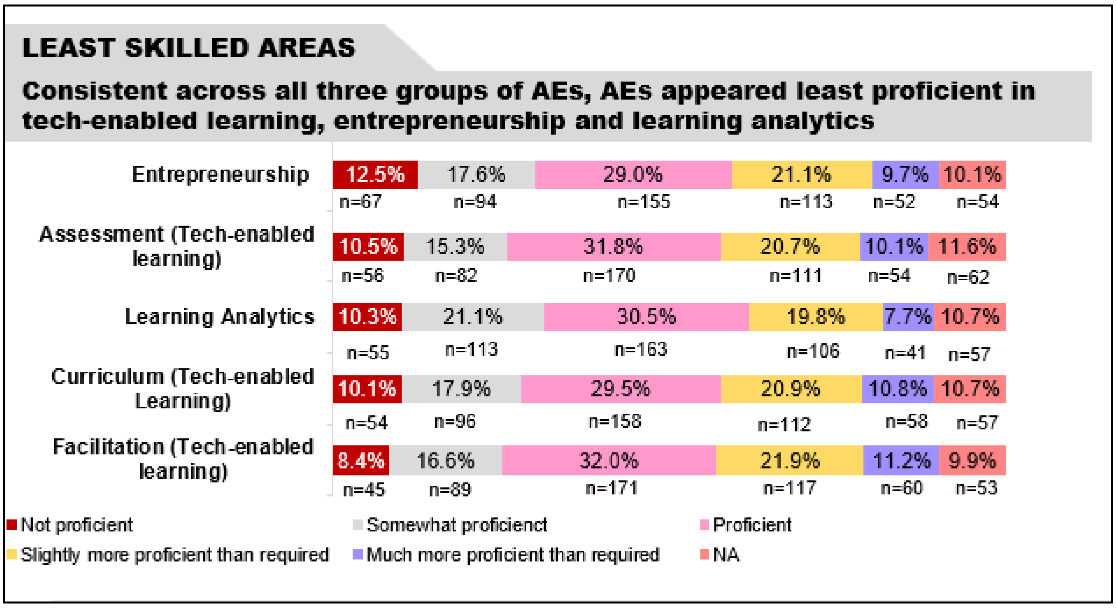


2f. Adult educators appeared more proficient in generic skills and traditional classroom mode of training; and least proficient in tech-enabled learning, entrepreneurship and learning analytics

AEs appeared to be more proficient in generic skills and traditional classroom mode of training. The top skilled areas are subject fields (M = 4, n = 518), teamwork (M = 3.9, n = 512), communication (M = 3.9, n = 517), problem-solving (M = 3.9, n = 513) and facilitation/training for classroom-based learning (M = 3.8, n = 503), using 5 Likert scales: 1= Not proficient, 2= Somewhat proficient, 3= Proficient, 4= Slightly more proficient than required, 5= Much more proficient than requires. The top skilled areas are consistent among three groups of AEs, in terms of training provider categories (public, private, and in-house) and employment status (full-timers, part-timers/freelancers and industry practitioners).

The least skilled areas reported by the AE respondents as "not proficient" include: entrepreneurship (12.5%, n = 67), assessment for tech-enabled learning (10.5%, n = 56), learning analytics (10.3%, n = 55), curriculum design and development for tech-enabled learning (10.1%, n = 54) and facilitation/training for tech-enabled learning (8.4%, n = 45). The least skilled areas are also consistent among three groups of AEs, in terms of training provider categories (private, IHL and in-house) and employment status (full-timers, part-timers/freelancers and industry practitioners). See Figure 8.

Figure 8: Least skilled areas reported by adult educators



The top professional development needs reported by the adult educator respondents include digital literacy, blended learning and tech-enabled learning, reflecting their view of top important skills or the skills they felt least proficient in. The top preferred development activities are courses/workshops (71.5%, *n* = 343), conferences (42.7%, *n* = 205) and visits to understand best practice (33.1%, *n* = 159).

2g. Passion stood out to be the key reason why most AEs joined the TAE sector

Our survey asked about the reasons why AEs decided to join the TAE sector. Of the 535 AE respondents, passion stood out to be the key reason why most AEs joined the TAE sector (64.5%, n = 345). It seemed that AEs view TAE as an open industry that offered opportunities for second career and work-life balance, with 40% (n = 214) of them indicated that they joined TAE sector because they want to expand and diversify skills and knowledge, 32.5% (n = 174) of them indicated that it is because they had the credentials/qualifications for TAE, 29.9% (n = 160) of them indicated that it is because they wanted a career switch and 29.3% (n = 157) of them wanted flexible working hours. Good pay was not viewed as a big incentive as only 12.5% (n = 67) of them opted good pay as a reason.

3. Challenges of Training Providers and Adult Educators

3a. Top challenges for training providers were difficulty in establishing partnerships in their business, time consuming in tapping TAE related policies/initiatives and lack of funding in organising staff professional development activities.

Of the 326 surveyed training providers, 214 indicated their challenges in business, 326 indicated their challenges in tapping on policies/initiatives and 290 indicated their challenges in organising staff professional development activities.

According to their responses, the top business challenges include difficulty in establishing partnerships (45%, *n* = 96), training is not a priority in enterprises (32%, *n* = 69), and learners lack of motivation (31%, *n* = 67). They responded that it was time consuming (31%, *n* = 99) in tapping on TAE related policies/initiatives. They also found the application process complicated (24%, *n* = 78), difficult in meeting criteria (22%, *n* = 73) and lack of information (21%, *n* = 69). Most of AEs faced multiple challenges (38%, *n* = 124). In terms of organising staff professional development activities, their top challenge was lack of funding or the training too expensive (40%, *n* = 116). Other challenges include unable to space more staff time (37%, *n* = 108), hard to find time to organise training (29%, *n* = 84) and difficult in finding training providers who can deliver training where and when as we want it (22%, *n* = 63). However, more than half of them indicated that they faced multiple challenges (57%, *n* = 165). See Table 5.

Table 5: Challenges reported by TP respondents

Business challenges	
Difficult to establish partnerships	45%, *n* = 96
Training is not a priority in enterprises	32%, *n* = 69
Individual learners lack of motivation for training	31%, *n* = 67
No challenge	17%, *n* = 55
Top challenges in tapping on 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 professional development 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

3b. 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.

Overall, almost half Adult educators expressed that one of their major challenges were competiveness in the TAE market, this is particularly so for the freelancers, 57% mentioned that they find it competitive to get access to training related work. AEs also mentioned career trajectories are not certain and difficult to respond to the changes in the TAE market. About half of the AEs also expressed difficulties in participating in professional development activities, mainly due to conflicts in schedule between training and work, cost for professional development is too expensive. Almost half AEs expressed they encountered multiple challenges such as time-consuming and lack of available information, when trying to tap on TAE related initiatives/policies, such as Capability Development Grant, iN.LEARN 2020, SkillsFuture Study Award, Adult Education Network, etc.

Table 6: Challenges reported by AE respondents

Top challenges in working in the TAE sector	
Competitiveness in the training market	46%
Career trajectories are uncertain	41%
Difficulty in responding to the changes in TAE market	34%
Lack of work-life balance	32%
Lack of access to professional development	31%
No challenge	16%
Top challenges in tapping on policies/initiatives	
Time consuming	38%
Lack of available information	35%
Difficulty in meeting criteria	25%
Multiple challenges	48%
No challenges faced	25%
Top challenges in professional development	
Professional development conflicts with work schedule	52%
Professional development is too expensive	52%
No incentive for professional development participation	43%
No challenges faced	18%

Summary

To sum up, 95% of the responded training providers were SMEs which hired less than 200 employees, and 2/3 of them were micro-SMEs with an annual turnover of less than S$1 million. It seemed that these small training providers were less advantaged as compared with bigger training providers. Overall, 1/3 of the TAE provider respondents were doing better than average, which adopted up-to-date technologies, led the way in developing new products, and highly customized their products and services to clients' needs. They were least dependent on price to gain competitive success. 15% of the TAE provider respondents were doing least in all these four aspects, among which 90% were micro-SMEs and 55% of them had less than 10 employees.

94% of the TAE providers are local companies and they are expanding their business overseas. About 30% have international presence with subsidiaries, branches or representative offices in other country/countries. Overall, the business performance and outlook seem positive. Over half of the training providers reported increases in business performances over the last 12 months and more than half of them expected increases in revenue over the next 12 months, with 17% expect more than 10% increase; though 19% experienced a revenue drop in the last 12 months.

For adult educators, over 70% of adult educators performed multiple roles in their work, covering a range of work related to training facilitation, assessment, curriculum design and development, training/learning needs analysis, administration to facilitate courses and accreditation, learning and performance consultancy, etc. Adult Educators seemed to be qualified in both academic qualifications and training qualifications. Over 90% of AEs obtained diploma or higher education qualifications. At least 2/3 were well-matched in their training qualification requirements. Adult educators appeared more proficient in generic skills and traditional classroom mode of training; and least proficient in tech-enabled learning, entrepreneurship and learning analytics. AEs were quite passionate about working in the TAE sector, about 65% reported that they joined TAE because of their passion for training.

The study also identified major challenges encountered by the TAE providers and Adult Educators. Training providers reported that they had difficulty in establishing partnerships in their business. They found it time consuming and tedious to tap on policies/initiatives. In terms of organising staff professional development activities, they were lack of funding or unable to release staff for training. Many training providers formed partnerships with other organizations to improve their business performance and enhance their products and services, and support staff development. For adult educators, they found the TAE market is very competitive and changing rapidly, they were not certain about career trajectories, particularly for those working as freelancers.

The results provide TAE providers and adult educators with an understanding of the environment in which they work, thereby potentially contributing to their strategic decisions about their personal career trajectories and organisational business development. The information about the skills proficiency and professional development needs can be useful reference for the design of necessary professional development programmes. It will also potentially enable TAE providers to better manage their programmes offerings and business models. For policy makers, understanding the challenges faced by the practitioners can help them improve existing policies, design new initiatives, and roll out well calibrated interventions where necessary.