



Data collection period:

■ TAE 1: 2017-2018 ■ TAE 2: 2021-2022

## 1 Sector Overview

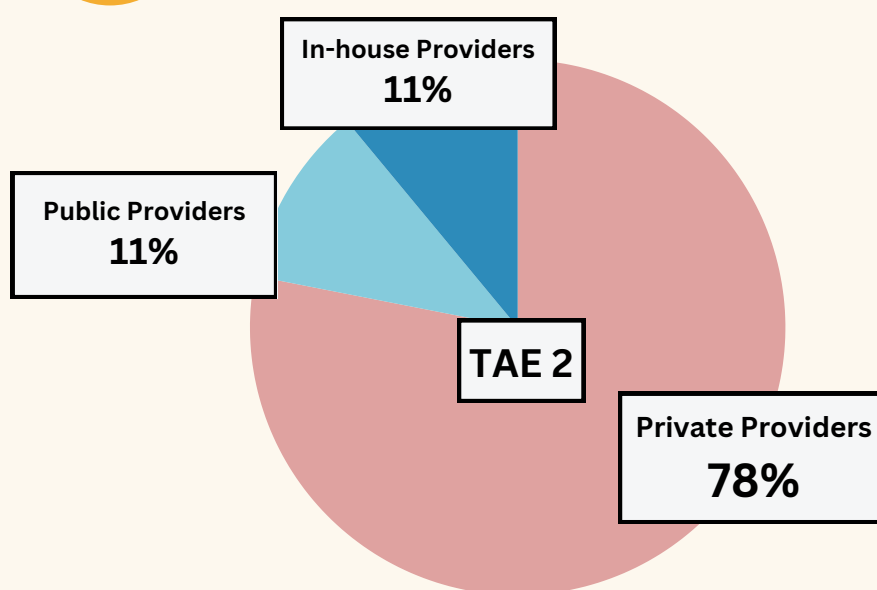
**4,000+**  
TAE Providers

**20,000+**  
TAE Professionals including adult educators, training administrators, business developers, etc

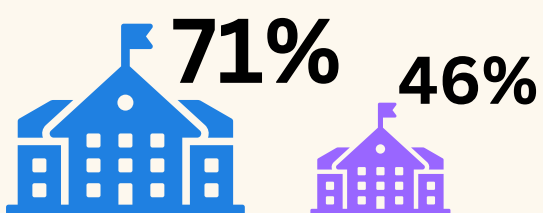
**1.8 billion**  
Projected Annual Value

**3.6 million**  
training places provided yearly

## 2 Sector Composition and Provider Shifts

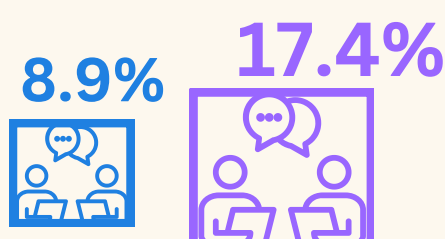


Fewer TPs identify themselves as Training Providers



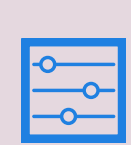
Fewer TAE providers offer training as their only service and more have ventured into providing consulting and customised training services.

Increase in Business Training Consultancy Organisations

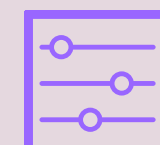


## 3 Growth in Customised and Non-WSQ Training

Increased number of TPs offering customised training solutions



29.8%



36.2%

Allows for tailored training pathways based on employer needs.

Increase in providers focusing exclusively on Non-WSQ offerings



43.1%

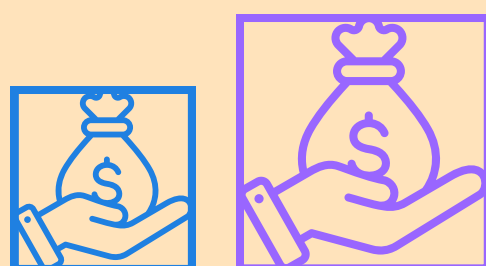


55.5%

Signals a shift from traditional WSQ models.



## 4 Funding Dependency



28%

43%

43% of providers reported that over half of their revenue was based on government funding.

Funding adjustments in 2022 increasingly favour **high-quality, certifiable programmes**, influencing provider strategies.

## 5 Years of establishment of TAE providers

Decrease in the proportion of new entrants to the TAE sector



13.4%

2.3%

1-2 years

There was a significant drop in the proportion of new entrants to the TAE sector, which may suggest higher barriers to entry.

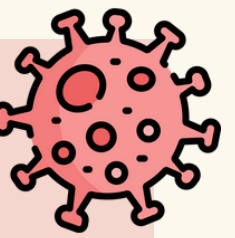
## 6 Workforce Demographics

Average age of AEs: **48 years**

**43%** of AEs have over **10 years** of experience

**25.5%** of AEs are industry practitioners who take on training as a **secondary** role

## 7 Impact of COVID-19



**53%** of providers reported revenue declines due to the pandemic, exposing financial vulnerabilities in the TAE sector.

COVID-19 drove a shift to online learning, with TPs enhancing digital infrastructure. This presents an opportunity for further digital innovation to enrich learning experiences.

## 8 Changes in AE Jobs

TAE 1 TAE 2

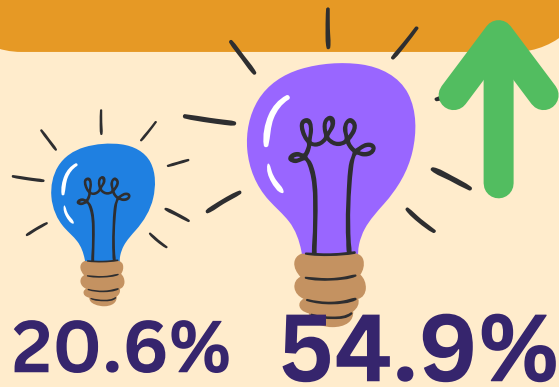
Median monthly income of AEs in TAE sector

\$4,150

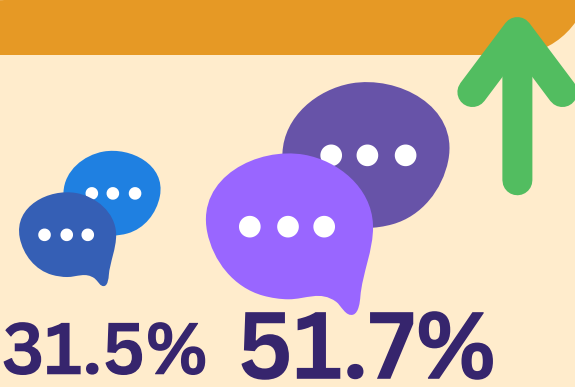
\$5,000

### Job Content

High TAE Knowledge

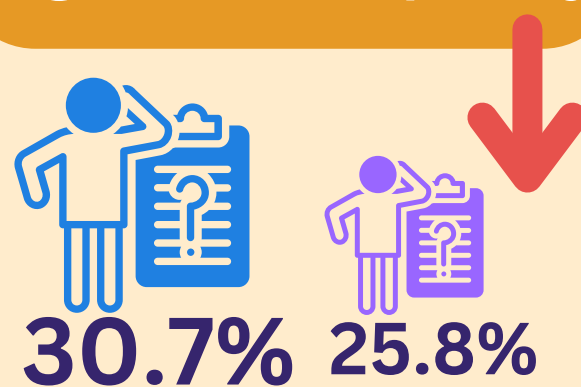


High Social Dimension\*

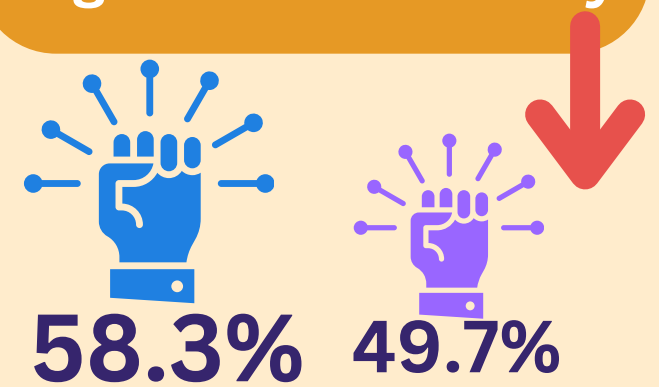


\*working collaboratively and effectively with others to contribute to group efforts to achieve identified objectives

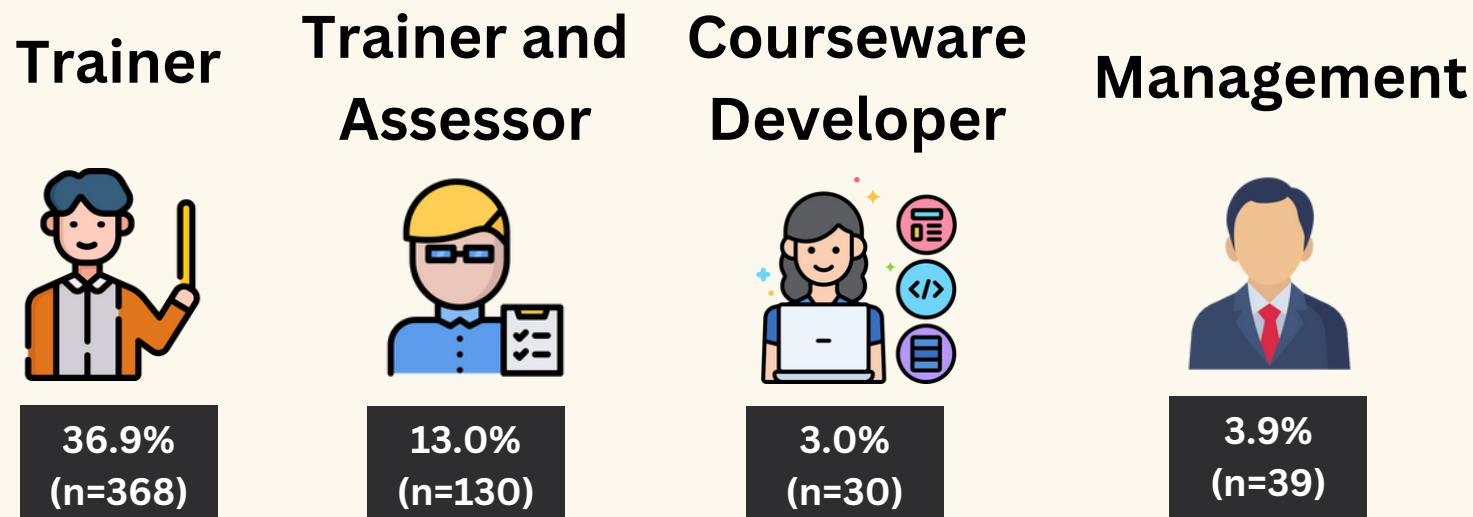
High Task Complexity



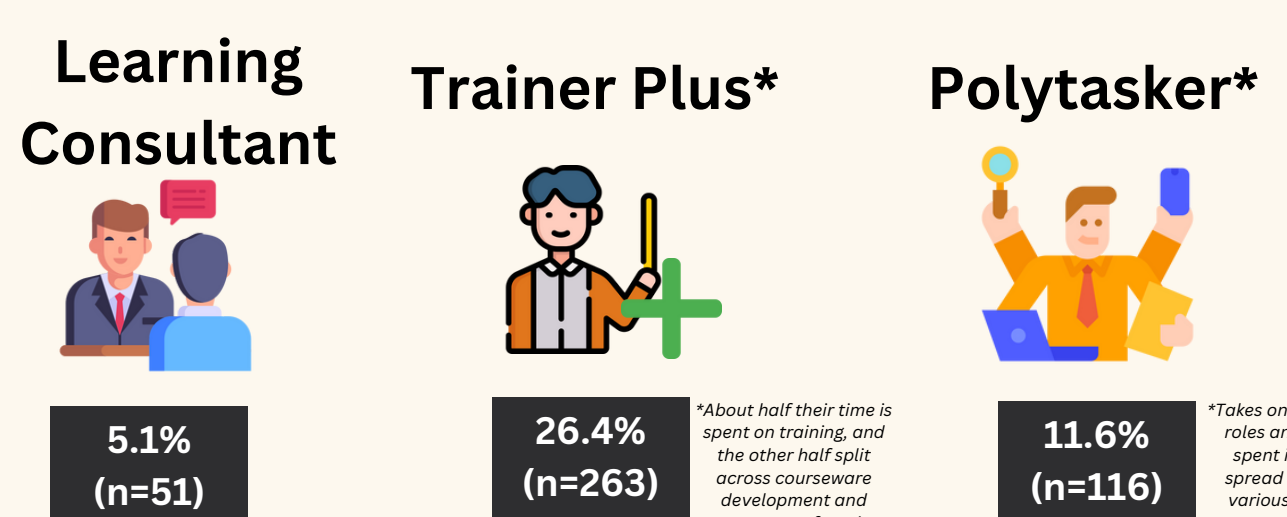
High Work Autonomy



### Traditional TAE Role



### Hybrid Role



\*About half their time is spent on training, and the other half split across courseware development and management functions

\*Takes on multiple roles and time spent is well spread across various roles.

- More than 40% of AEs now work in hybrid roles, combining multiple functions such as training, assessment, and course development.
- Hybrid roles offer greater flexibility but also present challenges in managing job complexity and career stability, highlighting a need for role-specific support and professional development.