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Industry, Science and  
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**COMMERCIAL EDUCATION  
AND TRAINING :  
PROFILE OF CANADIAN SUPPLIERS**

**SERVICE INDUSTRIES**

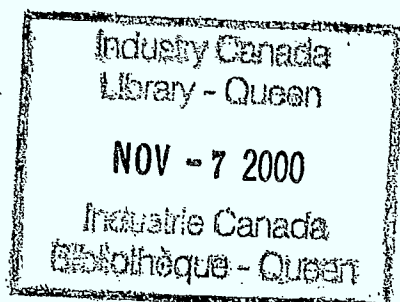
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**COMMERCIAL EDUCATION  
AND TRAINING :  
PROFILE OF CANADIAN SUPPLIERS**



**Prepared by:**

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October 1992

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Dr. M. J. Lynch of Industry, Science and Technology Canada reviewed and edited the document.

## Highlights

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### Structure

- The commercial education and training sector is made up of two types of suppliers, namely those who provide commercial education and training services as a primary business activity (*specialists*) and those who do so as a secondary activity (*product-related firms*).
- *Specialists* deliver training to the majority of people trained by the sector.
- Offices and operations are concentrated in central Canada (Ontario and Quebec).
- Most suppliers are small both in terms of number of employees and the number of individuals trained.
- Suppliers have been established recently, the majority within the last 6 years.
- The sector is dynamic and should continue to grow.

### Services

- Almost all of the firms in this sector offer some training related services other than training delivery.
- Executive/management development, computer related and supervisory training are among the fields of study most frequently offered by suppliers.
- Virtually all suppliers customize their training services to some extent to meet their clients' needs.
- More than half of suppliers provide training and related services in both official languages.

## **Market and marketing techniques**

- One in every two suppliers exports its services.
- Industries commonly served by suppliers include manufacturing (other than automotive and electronics related), public administration, business and personal services and educational institutions.
- Management (eg. financial, human resources, sales), professional and technical (eg. accountants, engineers, lawyers, technicians, technologists) and executive officers were the occupations most likely to receive training services.
- The majority of suppliers trained individuals employed by large firms (500 or more employees).
- Most popular marketing techniques involve a personal element.

## **Training program delivery**

- Most suppliers are capable of providing training services to client businesses on-site.
- Despite the fact that the commercial education and training suppliers are primarily servicing a relatively new market, traditional teaching methods are still the most commonly used.
- Large suppliers in general and suppliers training in technical areas were much more likely to consider technology important in the delivery of training.
- Most suppliers engage in strategic partnerships with other organizations or individuals in order to deliver training.
- The majority of suppliers provide instruction both during and outside normal working hours. However, suppliers are less likely to offer training outside work hours if training is a secondary activity or if they offer training in technical areas.



## Introduction

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The ability of Canadian industry to become globally competitive is increasingly dependent upon the capacity of its workforce to acquire new skills and knowledge and upgrade existing ones. Recognizing this need, a relatively large and diversified commercial training sector offering specialized training services has emerged beside the traditional public education sector. The commercial education and training services sector has a significant role to play in meeting the challenges of Canadian industry in the development of its human capital. In order to gather information about this sector and to assess the sector's capabilities, Industry, Science and Technology Canada (ISTC) initiated a sector campaign which involved, among other activities, a survey of private companies offering commercial education and training services.

This report presents the profile of the sector based on survey results. Chapter One describes the commercial education and training sector as a whole, focusing on structure in terms of characteristics of firms such as size, location, age and performance. Chapter Two explores the various types of educational services offered with emphasis on fields of training, language and availability of customized programs and training related services. Chapter Three discusses the market for these services with respect to their type, size, industry and occupation of the clients as well as several marketing techniques employed by suppliers in the sector. Finally, Chapter Four examines the different delivery mechanisms with regard to teaching methods, the importance of technology, the creation of strategic partnerships with other interested parties and the time and place of the delivery of training.

A survey of the suppliers of commercial education and training services was conducted by Industry Science and Technology (ISTC) in March 1992 in order to capture information on private firms which deliver education and training services primarily to business and government for profit. These firms include private companies, professional, business and industrial associations (eg.: The Petroleum Institute) and producers of training courseware which sell educational services for profit. Although public education institutions (eg.: universities, colleges, technical training institutes, foundations) and private education institutions might receive revenues from selling their educational services for profit, they were excluded from the survey.<sup>1</sup>

The commercial education and training sector offers job-related training and courses to employees for the purpose of increasing their productivity. The sector also supplies training to underskilled or laid off individuals to assist them in reintegrating into the labour force or maintaining employment. This sector was identified by the Canadian Labour Market and Productivity Centre (CLMPC), in its *Quarterly Review*,<sup>2</sup> as being critical in closing the growing gap between the demand and supply of qualified labour by providing the workforce with the skills deemed necessary by business. The services offered by this sector involve not only the delivery of training programs, but the planning and evaluation of these programs as well as the identification of training needs, upgrading of course material and the development of educational software. Training programs are generally available for a variety of fields, the most popular being computer related, executive/management development and supervisory training. Other commonly offered fields of training include communications training and professional technical training (eg.: office systems maintenance).

### ***A duality in structure***

The portion of the commercial education and training sector surveyed is made up of two main groups of establishments. The first includes those who provide

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<sup>1</sup>A separate study of private career colleges has been conducted, however the results were not incorporated into the present report.

<sup>2</sup>The *Quarterly Labour Market and Productivity Review*, Winter 1988.

commercial education and training services as the sole means of generating revenue. These firms are referred to in this report as *specialists*. They account for almost two thirds of the 3,200 firms in the sector and employ approximately 16,000 to 20,000 people<sup>3</sup>. Moreover, they trained 85% of all clients of this sector in 1991. The second group, which is referred to as *product-related firms*, is comprised of firms whose principal activity is not mainly education, but who offer commercial education and training as a secondary product, namely as part of the sale of their equipment or services. Examples of the latter group are computer or telecommunications equipment companies, whose sale of equipment and software may also include the provision of education and training associated with the use of their machines and software. Another example is that of the accounting or management consulting firm providing specialty courses based on its professional expertise as an addition to its regular services.

It follows then, that although both types of firms are involved in education activities they belong to different industries. Those that supply education and training as a primary activity are part of the educational service industries, while those who do so as a secondary activity belong to a variety of industries<sup>4</sup>. As a consequence, comparing results from this survey with any other industry survey results would be difficult, if not impossible.

### ***Offices and operations are concentrated in Ontario and Quebec***

The majority of firms had offices and operated in Ontario and Quebec (see Chart 1.1). This likely follows from the concentration of industries such as public utilities, public administration and financial institutions in these two most populous provinces, all of which have been shown by the Adult Education and Training Survey (AETS, December 1990)<sup>5</sup> to provide more education and training services to their employees than other industries.

Most suppliers tended to be **located** exclusively in one province (83%). Of the minority who had 5 or more locations, nearly a quarter of them had locations in

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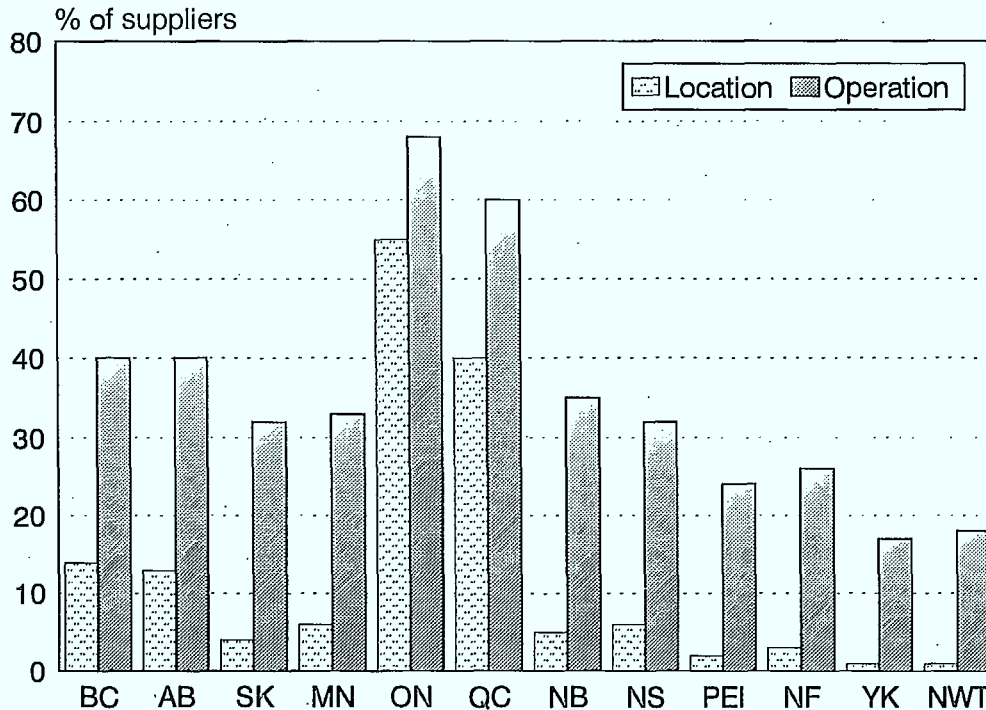
<sup>3</sup>This refers to the commercial education and training suppliers as identified by ISTC.

<sup>4</sup>Firms who are specialists may fall within either the elementary and secondary education industry, the post secondary non university education industry or the other educational services industry. The remaining firms who provide education and training as a secondary activity are classified according to their principal activity and thus may belong to a variety of different industries (eg. the accounting services, architectural, engineering, management consulting, computer and related services, communications and other electronic equipment, office machines, and telecommunications industries).

<sup>5</sup>The Adult Education and Training Survey was a household survey conducted in 1990 by Statistics Canada with financial support from Employment and Immigration Canada.

Chart 1.1

**Distribution of suppliers by province of location and province of operation.**



every province. These multi-location firms were more likely to be *product-related* firms and were also more likely to be larger in terms of employees. In contrast, firms were more likely to **operate** in more than one province (64%). The majority operated in fewer than five provinces. When they operated in five or more provinces, they generally operated in all provinces.

The fact that there were considerably more firms operating in each province than were located there suggests that firms in this sector, whether they are specialists or product-related firms, make their services available to clients in many provinces from one or more provincial locations. This feature makes commercial education and training unusual as a service industry. The fact that the clients are mainly business and government (rather than individuals) combined with the relatively easy transferability of training information and courseware serve to facilitate this interprovincial accessibility. Because they are not burdened by restrictive infrastructure it is often cost effective for the trainers to travel to different locations to deliver training services.

Virtually all of the firms surveyed (97%) were headquartered in Canada. The

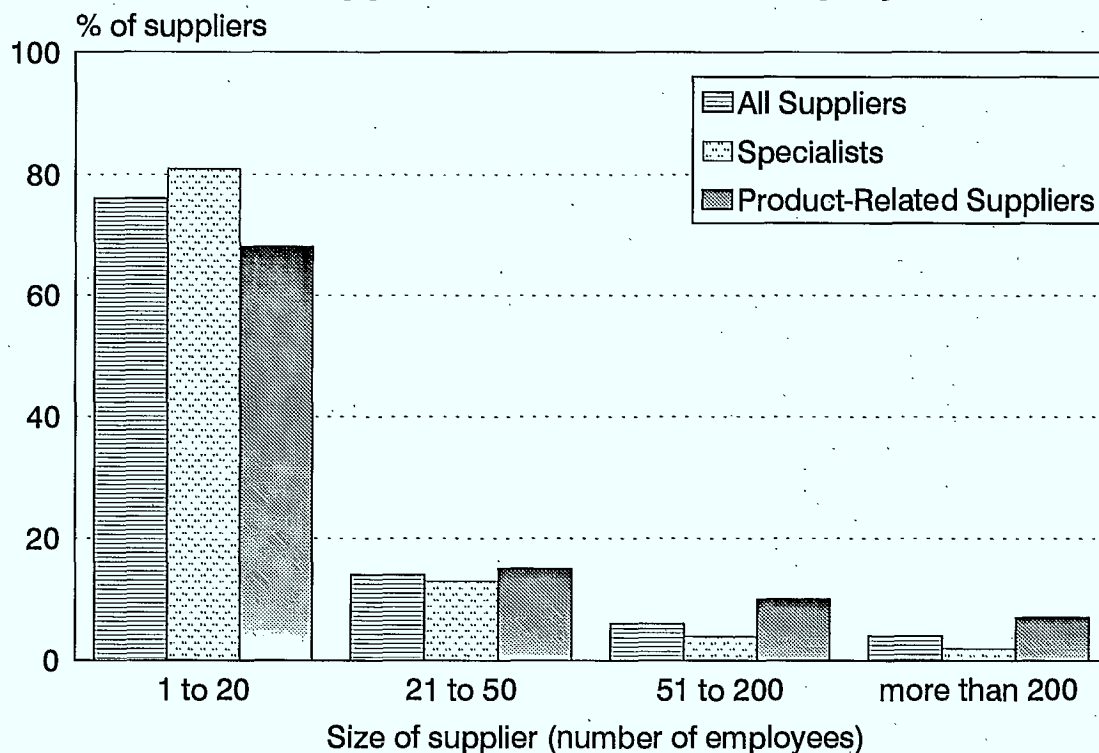
United States served as headquarters to 2% of the firms and 1% had their headquarters in other countries. However, as foreign firms who **operate** in Canada without having offices here were not included in the survey, there are likely many more foreign firms providing Canadian businesses with education and training services than the location of headquarters suggests.

***Most suppliers small in terms of number of employees and individuals trained<sup>6</sup>***

In total, three quarters of all firms had 20 employees or less, with two thirds of them employing only 3 to 10 people. Few (4%) had more than 200 employees (see Chart 1.2). Small firms (1 to 20 employees) were predominantly (68%) *specialists*, whereas large firms were predominantly (73%) *product-related* firms. A typical commercial education and training supplier is a small specialist with 10 employees or less.

**Chart 1.2**

**Distribution of suppliers by number of employees.**



<sup>6</sup>Note that number of people trained refers to course registrations rather than separate individuals. One individual enrolled in two courses would appear as two separate registrations.

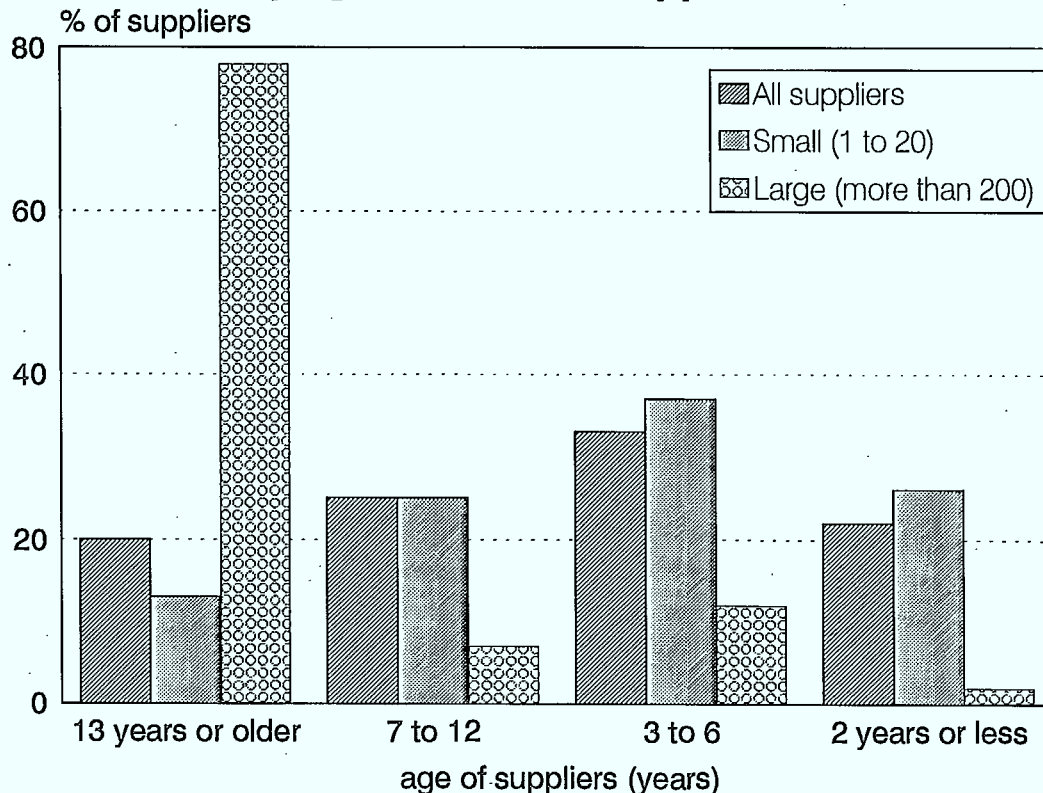


The average number of people employed by *product-related* firms was seven times greater than the number employed by *specialists* (157 versus 22). For these firms, however, it was not possible to distinguish the number of employees who worked directly with the commercial education and training service from those who were involved in other production activities, a factor which likely explains the large differences in average size.

Age played a role in the size of the firm as well. As one might expect, small firms tended to be established within the last few years whereas large firms were more likely to be founded more 10 years ago. This is consistent with older firms having more of a chance to establish a larger market and hire more employees to fulfil their growing obligations. (see Chart 1.3).

**Chart 1.3**

**Distribution by age and size of supplier.**



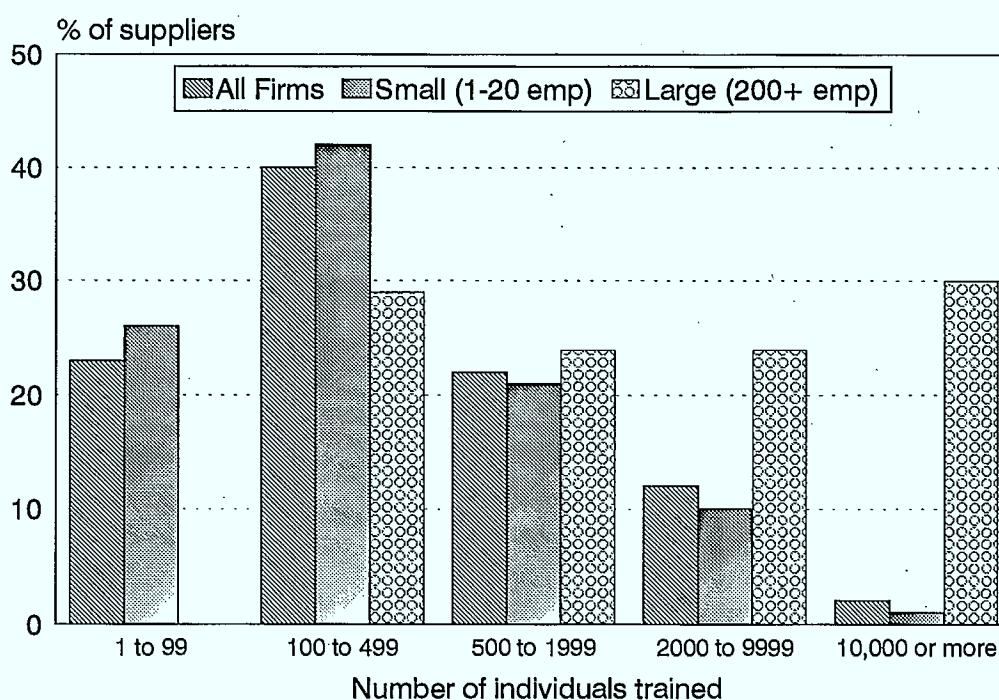
As no information exists on revenues generated by commercial education and training suppliers, the overall number of individuals trained served by them

might be used as a proxy for assessing their economic importance. Most firms were small in terms of the number of individuals trained, with 63% of firms training less than 500 people in 1991. Only 2% of firms reported training 10,000 individuals or more during the same period.

The number of people trained by the supplier was generally proportional to the number of its employees. Most small firms (68%) had less than 500 individuals trained, whereas most large firms (74%) had more than 500. Only 1% of small firms trained 10,000 or more as compared with 30% of large firms (see Chart 1.4). However, it is interesting to note that although the smallest firms (firms with 20 or less employees) made up three quarters of all suppliers they trained only a quarter of all clients. Moreover, the largest firms (firms with more than 200 employees) which made up 5% of all suppliers, trained a third of all clients (see Chart 1.5).

**Chart 1.4**

**Distribution of firms by number of individuals trained, 1991.**

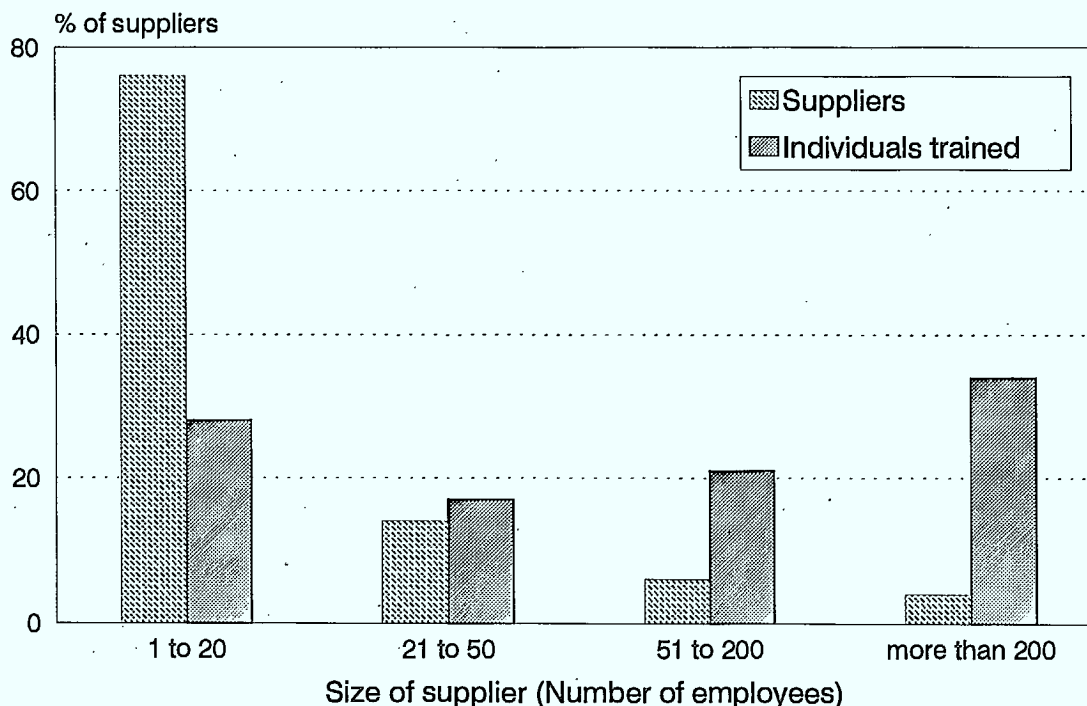


***A large proportion of employees in this sector consists of contract and casual personnel.***

As *specialists* were generally younger, and adjusted quickly to changing contracts, it was not surprising to find that they were more dependent on non-permanent employees than were *product-related* firms. (40% of employees in the *specialist* category were contract or casual personnel<sup>7</sup>. The *product-related* firms' labour force, on the other hand was primarily made up of permanent employees, of which virtually all had full time designation.)

**Chart 1.5**

**Distribution of suppliers and individuals trained  
by size of supplier.**



***Supplier firms are relatively young.***

The majority (80%) of the companies were established within the last 12 years, with 41% of them within the last six. This recent surge of growth is likely related

<sup>7</sup>Employees were designated as being one of the following : full-time permanent; part-time permanent; contract; or casual. The latter two were considered as being non-permanent positions.

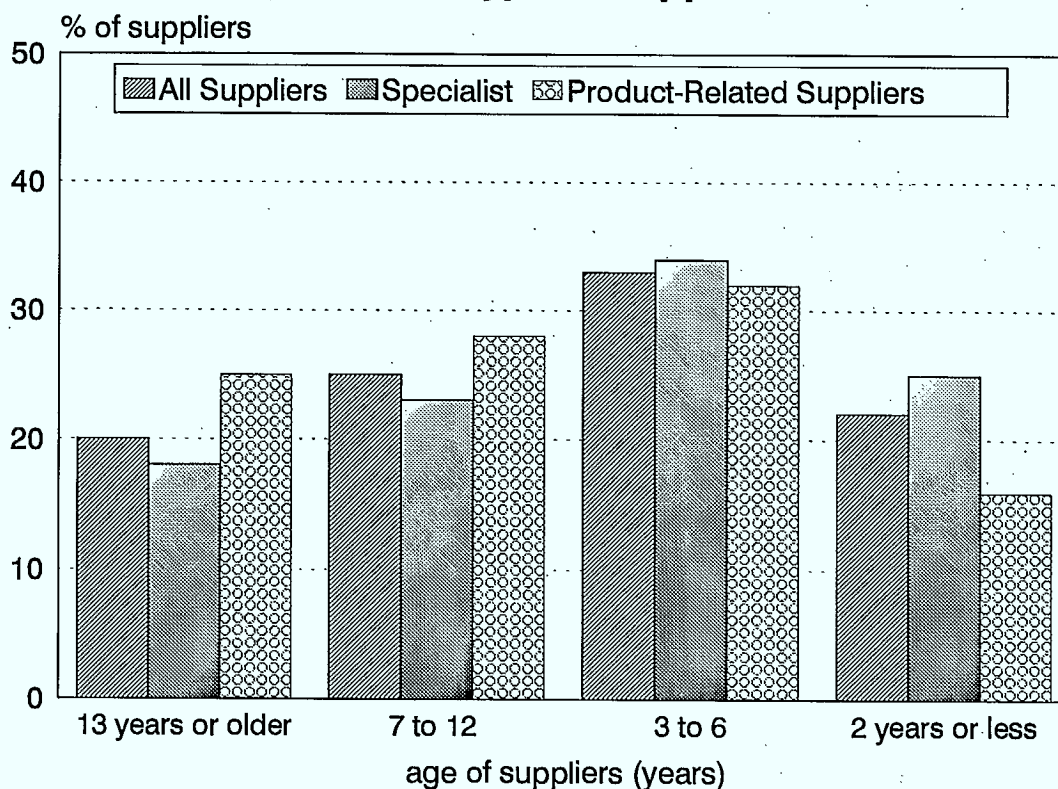


to the reorganization of business precipitated by the globalization of markets, the recession of the early 1980s as well as the widespread introduction of computers into the workplace, all of which created a need for the retraining of existing employees. Additionally, the Canadian public education system may have a limited ability in providing "job-specific" skills in certain fields of training, giving cause for private companies to supplement traditional sources of training in these skills. Moreover, effective management and supervisory skills are increasingly being recognized as integral factors in increasing employee productivity, thus encouraging firms to provide training in these areas as well.

*Specialists* were slightly more likely to have been established more recently than *product-related* firms. Among the *specialists*, 25% were established within the last three years as compared with the 16% of the *product-related* firms. On the other hand, 25% of the *product-related* firms came into existence more than ten years ago, as compared with 18% of the *specialists*. This coincides with *specialists* generally offering specialized education and training services in non-technical subjects (such as management), areas which have only received attention recently (see Chart 1.6).

**Chart 1.6**

**Distribution by age and type of supplier.**



***The sector is dynamic and should continue to grow.***

The expansion of this sector has been closely related, especially during the last decade, to federal manpower policies such as the National Training Act and the Canadian Job Strategy. Programs developed under these policies called for more participation from the private training sector and have increased the importance of training offered at the job site.

The historical lack of regulation in the commercial education and training sector has also contributed to its growth. Furthermore, no expensive physical infrastructure is required, reducing start-up costs. Personal contacts are likely to be the suppliers' initial client base, securing a demand for their services. Expertise and knowledge in various subjects, not pedagogy, is the central element required to provide adequate training in fields meeting employers' needs. All of the previously mentioned factors suggest there are few barriers to entry, encouraging many firms to establish themselves without much difficulty. The result is a large number of small firms competing heavily with each other for a small share of the market. For, although three quarters of all firms in the sector were small (20 or less employees), they trained only a quarter of all clients.

According to the survey of commercial education and training suppliers, the average annual growth rate in the number of people trained over the last five years<sup>8</sup> for all firms in general was approximately 25%. Specifically, more than half of the firms experienced a 1-20% average annual growth rate. In addition, 12% of the firms sustained an average growth rate of more than 50%, a third of them at more than 100%. These extremely rapidly growing firms were all small in size (20 or less employees) and mostly *specialists*. This high average annual growth rate appeared to be linked to the age of firm as well. Generally, the younger the firm the more likely it was to experience an average annual growth rate of more than 50%. Similarly, the likelihood of lower growth rates (1-10%) increased with the age of firm. In the short term it is assumed, however, that the evolution of suppliers is closely related to the business cycle. In other words, they are likely affected by their clients' budget contractions or expansions caused by changes in economic conditions. While some large companies might take advantage of an economic slowdown to retrain their employees, for the large majority of small and medium sized companies this situation would likely lead to the laying off of employees. This situation might also be worsened, at least in the initial phases of an economic downturn, by the entry into the sector of firms (such as management consultants) attempting to diversify their source of revenues.

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<sup>8</sup>This refers to the 53% of the firms that were able to provide an average percentage growth rate for the previous five year period. The low coverage likely follows from the fact that many of these firms have only been established quite recently.

Suppliers of commercial education and training provide a variety of services including training in various fields of study, custom tailored training programs and many training related services. Training is potentially available at any level without any prerequisite course requirements for the trainee. This, however, does not generally lead to the granting of a transferable diploma.

***Executive/management development training was most common field of study offered.***

Among the various fields of study available, executive/management development training was the field of training most often offered, followed by computer related, supervisory, communications, sales/marketing and professional technical training (see Table 2.1). Similar results were found in the AETS (1990) where the most popular courses supported by employers were those in commerce and business administration, engineering and applied science technologies and trades. This reflects the predominance of executives and managers among recipients of commercial education and training as well as the need for computer literacy in the workplace. The AETS (1990) and the Human Resource Training and Development Survey (HRTD)<sup>9</sup> have shown that white collar workers, in particular those in managerial, natural science and social science positions, generally receive more training than other workers. Secretarial and clerical, industrial technical (eg. welding) and remedial basic education were the fields of training least often provided, as workers requiring this type of training were more likely to receive informal "on-the-job" training<sup>10</sup> or training by technical or commercial institutes or by the regular school system.

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<sup>9</sup>Statistics Canada, Human Resource Training and Development Survey results, 1987, Cat. 81-574 occasional.

<sup>10</sup>"On-the-job" training refers to the unstructured training provided by the employee's supervisor or peers during the course of the job.

**Table 2.1**

***Proportion of suppliers offering various fields of training.***

	All firms	Specialist	Product-related
Executive and management development	52%	57%	43%
Computer-related	39%	30%	54%
Supervisory	38%	44%	27%
Communications related	32%	38%	21%
Sales and Marketing	24%	27%	19%
Professional technical	22%	18%	28%
Industrial relations and personnel management	22%	27%	15%
Secretarial and clerical	18%	22%	12%
Industrial technical	14%	13%	15%
Remedial Education	9%	11%	5%

Non-technical training<sup>11</sup> was more likely to be offered by *specialists*, whereas the *product-related* firms were more likely to offer technical training<sup>12</sup>. Non-technical training among *specialists* is likely linked to their tendency to train individuals in management related occupations (eg. financial, human resources, sales). Similarly, the frequent provision of professional technical training among the *product-related* firms likely follows from their products (eg. computers) or services (eg. accounting) being associated with highly automated office systems.

There appears to be a relationship between the size of the supplier and the field

<sup>11</sup>Non-technical training refers to training that does not involve technical knowledge. It includes fields of study such as executive/management development, supervisory, secretarial/clerical, sales/marketing, communications, industrial relations and remedial basic education training.

<sup>12</sup>Technical training involves training in technical fields such as professional technical (eg. office systems maintenance), industrial technical (eg. welding) and computer related training.

of training offered. The larger the firm, the more likely it was to offer technical fields of training such as computer related, professional technical and industrial technical training. In general, larger firms are more able to invest in the expensive equipment required to train clients in these fields. For the smaller firms, executive and managerial fields of training were predominant, as these fields of training do not involve investment in costly equipment.

The age of the firm did not have an impact on the proportion of firms offering each specific field of training. This would suggest that most older firms continually adapt the fields of training they offer to changing demands. That is, they are able to remain competitive by offering fields of training comparable to those offered by their more younger counterparts or those just entering the market.

***Virtually all suppliers custom tailor their training services to some extent to meet their clients' needs.***

The commercial education and training sector appears to fill a gap between public education and on-the-job training. The services provided by the sector are generally custom tailored to the clients' needs and for this reason the products of the sector are not as standardized as they are in the public education sector. This characteristic results from the majority of its clients being business and government employees rather than individuals.

For virtually all firms (98%), training and education involved to some extent custom tailoring of services to their clients' needs. Specifically, the majority of the firms (61%) tailored at least 75% of their training programs to meet their clients' needs. The fact that these programs need not be transferable facilitates this versatility in the training program and its delivery.

The availability of custom tailored programs varied with the size of supplier (in terms of the number of employees). The smaller the supplier, the more likely it was to have more than half of its training programs custom tailored to its clients. This reflects the fact that small firms are more flexible in that they likely design their services to respond to the specific requirements of each contract. In contrast, large firms are likely to be less flexible in course content and tend to offer, on a continuing basis, education and training programs that they have already developed.

Suppliers of training will often compete on the basis of services they offer (ie, fields of training, delivery methods, etc.) rather than on the basis of the industry sector or the geographic area that the supplier is trying to serve.



### ***Training related services.***

Almost all of the firms in this sector (96%) offered some training related services other than training delivery. These training related services included assessment of training needs, curriculum design, training of trainers, planning and evaluation of training and methods assessment (see Table 2.2). It is interesting to note that not all firms delivered training programs as part of their training activities, as one might have expected. That is, for some (more than one fifth of the firms) the commercial education and training activity only involved making recommendations regarding existing or needed education and training, or training trainers to fulfil these needs.

**Table 2.2**

#### ***Proportion of suppliers offering different training-related services***

Needs assessment	74 %
Curriculum design	71 %
Training trainers	68 %
Analysis	67 %
Planning	67 %
Design	64 %
Evaluation	56 %
Methods assessment	47 %

The availability of training related services suggests that the sector might play an important role for clients who cannot afford to support a training division internally. Commercial education and training suppliers can specify training needs and design training programs as well as train trainers to assist its clients in training their own employees. This is yet another example of how responsive this sector is to the needs of its clients. Rather than merely providing the training itself, the supplier can be active in some or all stages of training, guaranteeing a market which extends beyond the direct delivery of training programs.

### ***More than half of suppliers provide training and related services in both official languages.***

Nearly all firms (90%) offered their services in English as compared to 60% of firms who provided training in French. More than half (55%) of the firms offered training in both languages. Some firms (10%) offered training in languages other than English or French as well. These firms were the ones most likely to export their education and training products and services to various international regions as more than half of these firms conducted business abroad.

As expected, the highest proportion (27%) of firms offering training in French only<sup>13</sup> was found among firms **located** in Quebec, as was the lowest proportion (3%) of firms offering training in English only. However, a much higher percentage of firms (21%) offering English only was found among firms **operating** in Quebec. This would indicate that the need for training in English in Quebec is being provided by firms located in other provinces. Similarly, there is evidence that Quebec based suppliers are providing training services in French to the other provinces.

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<sup>13</sup>This percentage is comparable to the proportion of firms offering English only for the other provinces.

The sector was defined as including all firms deriving most of their revenues from business and government clients. However, the results of the survey show that in fact 60% of the suppliers also derived some of their revenues from individuals. Therefore, there is a sizeable number of Canadians seeking training on their own time and at their own expense to improve job-related skills or for career development.

***One in every two suppliers exports its services.***

Almost half (46%) of the firms sold their commercial education and training services in international markets. However, we know little in terms of the revenues generated by this market. These firms exported their services mainly to the United States (66%) and Europe (44%), following from, particularly in the case of the United States, its proximity to Canada, as well as its similarities in culture and language. Asia (28%) and Africa (23%) were also popular destinations as commercial education and training is channelled to these regions through aid and development projects supported by the Canadian International Development Agency (CIDA). On a regional basis, Quebec was the province most likely to serve the European, African and Latin American markets. Ontario, on the other hand, was the most likely supplier to the American market, while the Prairie provinces and British Columbia were the ones most often supplying the Asian and Australian markets (see table 3.1). To date, Canada has participated in a large number of international projects as it is recognized as a leader in a variety of areas such as mining, petroleum, telecommunications, public administration and engineering.

Firms that supplied commercial education and training services abroad differ somewhat from those that served only the domestic market. Differences were found in terms of their age, the industries they served and the fields of study offered. International suppliers tended to be older than their domestic counterparts. Moreover, they were more likely to serve the service industries (i.e. utilities, business and personal services, finance, insurance and real estate) and offer training in non-technical fields (i.e. executive/management development, supervisory and communications). On the other hand, domestic suppliers were more likely to serve the community services industry and offer secretarial/clerical training.



**Table 3.1*****Provincial distribution of suppliers by foreign market\*.***

	Europe	Asia	Australia	Latin America	Africa	United States
	% distribution					
Atlantic	19	19	10	14	19	19
Quebec	29	9	4	20	19	20
Ontario	18	11	7	17	8	39
Prairies	15	19	7	17	16	27
British Columbia	17	20	15	15	5	29
Yukon and NWT	50					50

\* Only includes suppliers with one location.

***The typical trainee is well-educated and in his or her prime working years.***

Based on the results of the Adult Education and Training Survey (1990) more than 1.6 million Canadians had their training sponsored by their employer in 1990<sup>14</sup>. While close to a third of them attended academic institutions, the rest received their training either from their employer or other providers. The likelihood of being trained was influenced by the personal characteristics of the individual who received the training, namely, his or her age, gender, level of education and job tenure. With respect to age, the majority of employer-sponsored trainees were between the ages of 25 and 44, with those between 25 and 34 receiving the most training. Overall, almost the same proportion of men and women had their training supported by their employer. However, large differences were observed within some industries and occupations. Training rates for males were significantly higher than for females in industries such as other primary, manufacturing, trade, business and personal services, and public administration. On an occupational basis, training rates for males were higher than for females in sales and most blue collar worker positions. Women in natural sciences and social sciences got significantly more training than men. Employees with higher levels of education were also more likely to receive education or training from their employer, with employees possessing a university degree having the highest rate and those with grade 8 or less having the lowest rate. Training rates increased<sup>15</sup> as well with the length of service with the

<sup>14</sup>This does not include individuals receiving unstructured or informal "on-the-job" training.

<sup>15</sup>The training rate is the ratio of the number of employer-sponsored trainees for the total number of employees.

<sup>16</sup>This does not include apprenticeship programs.

same employer<sup>16</sup>. Rates of training were lowest among new employees and highest among those with 12 years seniority. Less experienced employees were more likely to receive full-time career oriented training, whereas short-term or part-time training to upgrade skills was more common among more experienced employees. Alberta was the province with the highest training rate, followed by Ontario, British Columbia and Manitoba. Lower training rates were found in the Atlantic region, with PEI and Newfoundland having the lowest training rates.<sup>17</sup>

***Clients tended to be concentrated in a few industry groups.***

Industries commonly served by the commercial education and training sector included manufacturing (other than automotive and electronics related), public administration, business and personal services, and educational institutions (see Table 3.2). This is comparable to the AETS (1990) findings which showed that rates of employer-sponsored training were highest among the service industries (specifically public administration, finance, communications transportation and community services) and the manufacturing industry (which was above the goods-producing industries' average). Lower rates of training occurred in agriculture, other primary industries, construction industries as well as food, beverage and accommodation industries, where training would likely be informal (ie. "on-the-job"). This can be explained, especially in the case of the food, beverage and accommodation industries, due to a fair proportion of employees being temporary or part-time and hence not likely to be eligible for formal training benefits<sup>18</sup>. Finally, most firms in these industries are relatively small and can't afford to offer structured training to their employees.

***Professionals more likely candidates for commercial education and training services.***

The three occupational groups most often trained by the commercial education and training services sector were management (eg. financial, human resources, sales), professional and technical (eg. accountants, engineers, lawyers, technicians) and executive officers<sup>19</sup>. *Specialists* tended to train management related

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<sup>17</sup>AETS (1990)

<sup>18</sup>In 1991, 36% of the employment in Accommodations, food and beverage industries was part-time. In comparison, part-time jobs represented 20% of employment in the service sector and 16% of all employment in Canada. (Source: Statistics Canada, Labour Force Survey, 71-220)

<sup>19</sup>These are occupational groups that usually require higher levels of education. It is these employees which generally receive more training from their employers. The AETS has shown that the likelihood of being trained was seven times higher for employees with a university education than for those with only elementary level of education.

occupations, whereas *product-related* firms were more likely to have professional and technical occupations as major components of their clientele. As mentioned before, this was likely a function of the products and services offered by each firm type. Few firms trained individuals in occupations such as construction, primary industries (forestry, fishing, mining, farming), and transport equipment operating/materials handling (eg. truck driver, shipping and receiving), as these occupations receive less regular or formal training than others (see Table 3.3).

The age of the training supplier did not appear to have an impact on the proportion of firms serving each occupational group. This would suggest that in addition to revising their fields of training to changing demands, older firms adapt easily to new clientele as well. This is yet another example of how client-driven this sector is as its provision of training programs depends heavily on the needs and demands of the market it is trying to serve.

### ***Commercial education and training suppliers offer their services to clients of all sizes.***

The commercial education and training sector offered training to various sizes of firms, the majority of them training employees of very large firms (500 and more employees). This was supported by the AETS (1990) and the HRTD (1987) both of which found that the incidence of training offered by employers increased with the size of firm. This likely follows from large firms being more able to afford the expense of education and training for their employees, whether for financial reasons or as a result of lower employee turnover rates. The higher incidence of training in large firms resulted from the fact that they are more likely to be affected by the introduction of new technologies requiring formal training, as well as their tendency to formally plan for the training needs of their workforce. Larger firms are also generally found in the utilities, public administration, transportation and communications industries all of which have been found to have greater rates of employer-sponsored training.

**Table 3.2**

### ***Proportion of suppliers deriving a major component of their total billings from different industries.***

Manufacturing*	38 %
Public Administration	33 %
Business and Personal Services	33 %
Education Institutions	30 %
Communications	29 %
Utilities	29 %
Trade	28 %
Finance, Insurance and Real estate	28 %
Health and Social Services	27 %
Transportation	20 %
Electronics Manufacturing	20 %
Community Services	18 %
Other Primary (Forestry, Fishing, Mining)	17 %
Automotive Manufacturing	14 %
Construction	14 %
Accommodation, Food & Beverage	13 %
Agriculture	4 %

\* Except automotive and electronics

Although small suppliers trained clients from firms of all sizes, in general, the larger the supplier, the more likely it was to serve larger client firms and the less likely it was to serve smaller client firms. In other words, the small supplier tries to serve all sizes of clients in order to capture to a larger share of the market, whereas the larger supplier can afford to concentrate more of its training efforts on larger clients.

### ***Future opportunities***

According to Employment and Immigration Canada, by the year 2000, some 40% of new jobs will require more than 16 years of education and training as compared to 23% in 1986. This would imply that new entrants as well as those already in the labour force will have to perfect their knowledge and improve their skills. The shift in the proportion of the labour force from the secondary to the tertiary sector<sup>20</sup> as well as the high rates of growth in the technical and managerial occupations will also lead to increased training requirements.

### ***Popular marketing techniques involve a personal element.***

Like most firms in the services sector, commercial education and training services suppliers are competing on the quality of the services they offer and their capacity to respond to clients' needs. For these reasons, techniques used to market their services will differ from those used by producers of tangible consumer goods. Rather than relying on mass advertising methods to make their product known, more emphasis is placed on personal contacts. In fact, virtually

**Table 3.3**

### ***Percentage of suppliers having different occupational groups as major components of their clientele.***

Management (e.g.: financial, human resources and sales management)	66 %
Professional and technical (e.g.: accountants, engineers, lawyers, technicians)	55 %
Executive officers	46 %
Clerical and office (e.g.: account clerks, secretarial, receptionist)	34 %
Production personnel	23 %
Repair and Industrial maintenance trades	18 %
Services (e.g.: protective, food & beverage, accommodation and personal services)	15 %
Transport equipment operating & Material handling	10 %
Forestry, fishing, mining, farming	8 %
Construction Trades	6 %

<sup>20</sup>The secondary sector includes manufacturing, construction and utilities industries. The tertiary sector is made of service-producing industries.

all suppliers surveyed reported using personal contacts (98%) and previous client references (97%). Approximately two thirds of the firms used targeted mail-outs (68%) and government contacts (65%)<sup>21</sup>. The relatively modest size of suppliers and the reliance on marketing techniques involving a personal element can explain the low proportion of suppliers having a formal marketing plan. (see Table 3.4).

Mass advertising methods which include general brochure distribution, trade shows and media advertising are more expensive and for this reason were mainly used by larger firms.

**Table 3.4**

***Percentage of suppliers reporting different marketing techniques as somewhat or very important.***

Personal Contact	98 %
Previous client references	97 %
Targeted Mail-outs	68 %
Government Contacts	65 %
General Brochure Distribution	52 %
Trade Shows	44 %
Media Advertising	34 %

<sup>21</sup>These percentages include suppliers that indicated a marketing technique to be either very important or somewhat important to their marketing efforts.

## A. Teaching Methods and Media

*Traditional classroom teaching methods are still the most often used.*

Most suppliers surveyed were using the traditional classroom teaching methods: print (87% of suppliers), seminars/workshops (80%), and lectures/ demonstrations (79%). The least used methods were the technologically advanced ones. Among these advanced methods however, computer aided instruction was more commonly used (21% of suppliers), than interactive video (11%), teleconferencing (6%), and videodisc (6%) (see Table 4.1).

*There was more diverse use of teaching methods among suppliers specializing in training than among product-related suppliers.*

Among product-related suppliers, use of print, lectures/demonstrations, and seminars/workshops was predominant. Although the proportion of specialists and product-related suppliers using these methods was equally high, a larger proportion of suppliers specializing in training were using audio cassettes (37% vs. 14%), videotape (65% vs. 43%), role playing (57% vs. 31%) and case studies (62% vs. 49%). Product-related suppliers were however more likely than specialists to be using computer-assisted instruction (37% vs. 19%)<sup>22</sup>.

The largest suppliers (more than 200 employees) were more likely than smaller ones to use almost all types of methods, suggesting that greater resources are associated with more diverse use of teaching methods and presentation media. Among the specialists, more diversity in commonly used methods<sup>23</sup> was related

**Table 4.1**

*Percentage of suppliers using different teaching methods and media.*

Print	87 %
Seminars and workshops	80 %
Lectures and demonstration	79 %
Videotape	57 %
Case studies	57 %
Role playing	48 %
Slides	46 %
Individual (self-paced) program	37 %
Audio cassette	28 %
Computer-assisted instructions	21 %
Interactive video	11 %
Teleconferencing	6 %
Laser videodisk	6 %

<sup>22</sup>This pattern of usage reflects the fact that product-related suppliers were much more likely than specialist suppliers to be supplying computer-related training, while specialists were more likely than product-related suppliers to be supplying non technical business related training and basic remedial education.

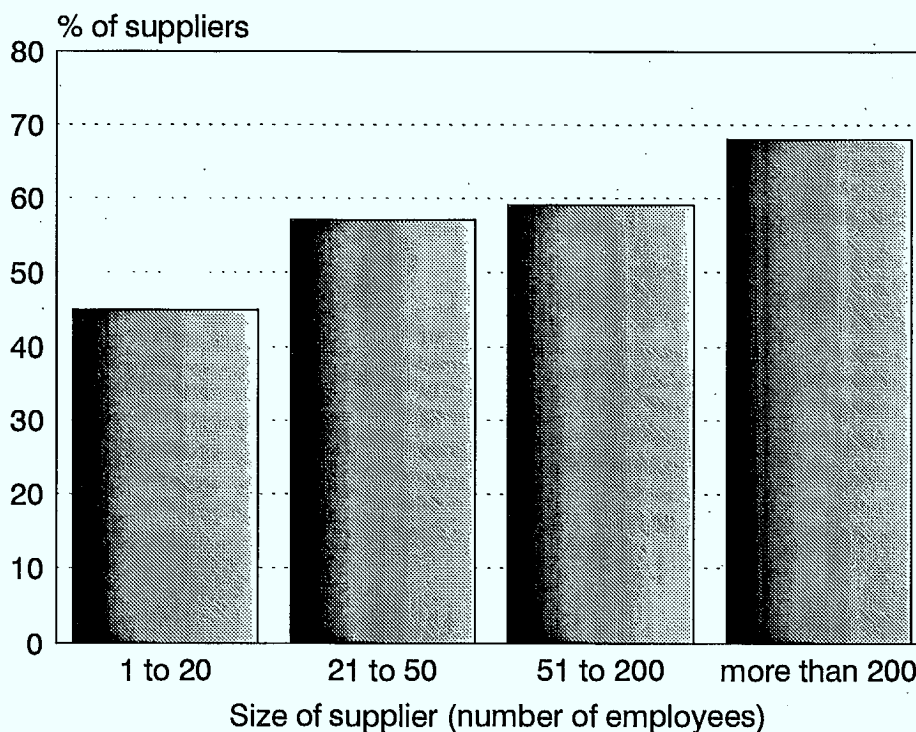


to increasing size of supplier. The proportion of larger *specialists* (those with more than 20 employees) using videotape was as high as the proportion using print, lectures/demonstrations, and seminars/workshops. Among the largest *specialists* (more than 200 employees), use of several other methods (individual (self-paced) programs, 83%; case studies, 75%; and role playing, 75%) was almost as common as use of videotape, print, lectures / demonstrations, and seminars / workshops.

More use of recording media (eg. videotape and audio cassette) among the largest *specialists* suggests that more of these suppliers may be recording courses or training information for repeated use<sup>24</sup>. Purchase of this type of "permanent copy" training by clients potentially reduces the cost of training per trainee. For example, in a business where shift work and rapid turnover of staff make it difficult to train employees in groups, use of this type of training method would be much more cost effective.

**Chart 4.1**

**Percentage of suppliers who consider technology important in the delivery of training, by size.**



<sup>23</sup>A commonly used method refers here to one used by 75% or more suppliers.

<sup>24</sup>This is supported by the fact that a greater proportion of these suppliers use individual (self-paced) programs.

***There were considerable differences in use of methods by suppliers of different fields of training.***

Notably, suppliers training in computer-related, professional technical, industrial technical, secretarial/clerical and basic remedial education were about twice as likely to use computer assisted instructional techniques as those training in the non-technical business-related fields<sup>25</sup>.

Use of visual presentation techniques such as slides, videotape, videodisc, and interactive video were most common among suppliers training in industrial technical fields. Use of these techniques in this field was in general much more prevalent than in the computer-related or professional technical fields (the other technical fields), probably because training in the latter fields focuses primarily on hands-on computer training.

Videotape was used by more than 60% of suppliers in all fields except those offering computer-related training (43%).

Use of individual (self-paced) programs was most common among suppliers of secretarial/clerical and basic remedial education (54% and 59%) and least common among suppliers of executive/management and sales/marketing (39% and 40%). Suppliers of business related non-technical training were much more likely to use role-playing and case studies in their training than suppliers in the technical fields<sup>26</sup>. It is probable that group dynamics are more important to training in business related non-technical fields than they are to training in technical, clerical and remedial education areas.

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<sup>25</sup>Non-technical business-related fields include executive/ management, supervisory, sales/marketing, communications, and industrial relations.

<sup>26</sup>Technical fields include computer-related, professional technical and industrial technical.



## **B. Importance of technology in the delivery of training**

***Large suppliers and suppliers training in technical areas were much more likely to consider technology important in the delivery of training.***

The results of the survey show that technology is considered important in the delivery of training for approximately half of the commercial education and training suppliers. Technology was also more likely to be considered important in the delivery of training by large suppliers than by small suppliers (Chart 4.1). This is supported by the finding that the large suppliers were far more likely than small ones to be using media such as videotape, interactive video, videodisc, computer assisted instructions and teleconferencing (see section on methods).

Those training in technical areas and in basic remedial education were much more likely than those training in non-technical areas to have indicated that technology was important for delivery<sup>27</sup> (Chart 4.2).

***Use of technology is one of the ways that suppliers in this industry can reduce the cost of training.***

Training is traditionally a labour intensive process. A Conference Board of Canada (1991) report<sup>28</sup> which examined the training and development practices of 444 mid-sized to large private-sector Canadian organizations found that salaries for full-time training staff averaged 43% of the whole training budget of these firms. Increased use of technology that allows the supplier to make training a less labour intensive activity will eventually<sup>29</sup> result in a less expensive product for client firms. For example, use of technology-based delivery mechanisms in production of recorded custom tailored training sessions or self-paced training programs<sup>30</sup> could be sold to a client firm, reducing the cost of training per individual trained.

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<sup>27</sup>The difference between the proportion of suppliers in technical fields and the non-technical fields considering technology important may be exaggerated. The survey question asked suppliers whether technology was important in the delivery of their training programs and services. Some suppliers of training in technical areas may have confused the issue of training people to use technical equipment with the issue of using technology in the delivery of training.

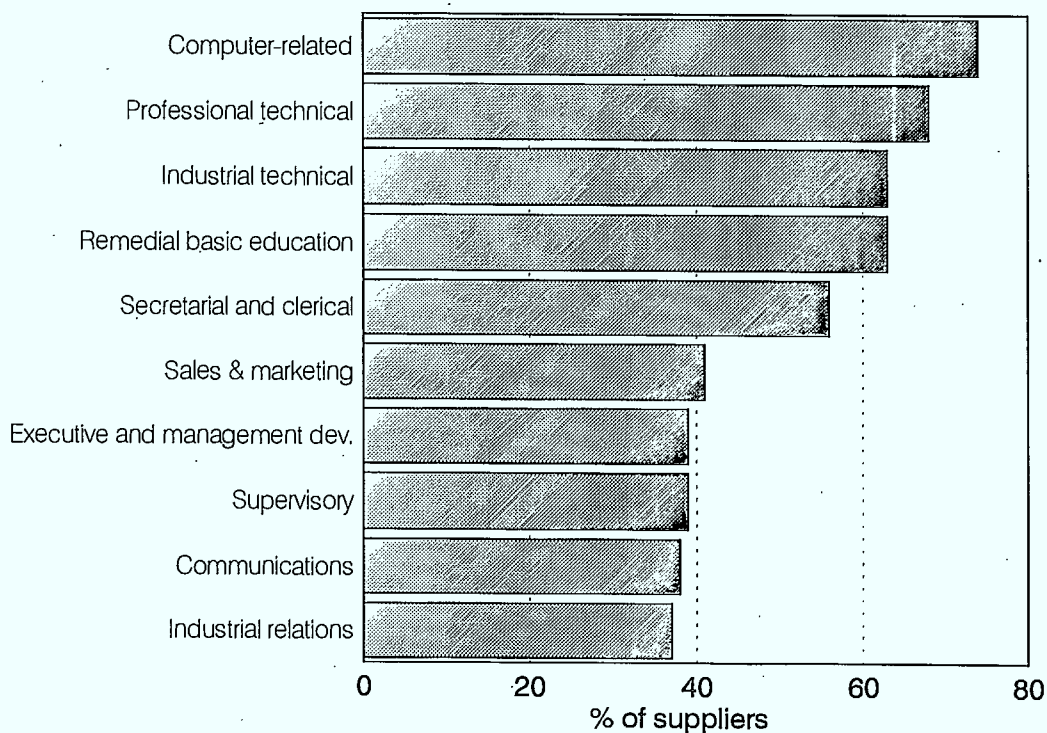
<sup>28</sup> Conference Board of Canada (1991) Training and Development 1990: Expenditures and Policies

<sup>29</sup>The "front-end" costs to develop the technology-based training are very high. Over time, these technologies can become cost effective.

<sup>30</sup>Instructions on audio cassette, videotape, videodisc, or using computer-assisted instructions.

Chart 4.2

Percentage of suppliers who consider technology important in the delivery of training, by field of training.



The results of the survey show that large suppliers are currently more likely both to indicate that technology is important in their delivery of training, and to use technology-based delivery techniques. As the cost of these techniques declines over time, it can be expected that a larger proportion of small players will be able to participate in the benefits of using them (Conference Board of Canada, 1991).

The commercial education and training sector also has a role to play in assisting other industries to become more effective users of new technologies. Increased use of technology in training can assist in the retraining of workers displaced by technological change as well as assist workers to adjust to new technologies in the workplace.

## C. Use of Strategic Partnerships in Delivery of Training

### ***Most suppliers engage in strategic partnerships with other organizations or individuals in order to deliver training.***

Most firms (87%) engage in some type of strategic partnership in order to deliver training services. The proportion of suppliers engaging in partnerships did not vary much by size of firm, field of training offered or between the *specialist* and *product-related* suppliers. Partnerships with other private enterprises and private individuals were the most prevalent (68% and 65% of suppliers), while a lesser but still significant proportion of suppliers formed links with public educational institutions (48%).

The evidence suggests that the commercial education and training sector maintains closer ties with other private sector players than with public educational institutions. Given the emphasis of the educational and training sector on workplace training, the proportion of suppliers with links to the public sector is actually surprisingly high<sup>31</sup>. It is possible that this reflects the increasing tendency of public sector suppliers to enter the business training market<sup>32</sup>.

Large firms (more than 200 employees) were more likely than small firms (20 or less employees) to have partnerships of all types in order to deliver training (Chart 4.3). Since most large firms had been established over 10 years ago (78% before 1979, as compared with 13% of the small firms), it suggests that these partnerships develop over time and are advantageous.

Suppliers providing training in the technical fields and basic remedial education were more likely to have links with other businesses in order to deliver services whereas suppliers of non-technical business related training were more likely to have links with private individuals. This might be because suppliers in non-technical fields tend to employ consultants from universities, colleges, business or government whereas suppliers training in technical fields may rely more heavily on contacts with suppliers of technical equipment.

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<sup>31</sup>We do know that suppliers offering training in industrial technical (60%), remedial basic education (56%), and industrial relations (54%) are the suppliers most likely to have alliances with public educational institutions in order to deliver training. Those least likely to have these links are the suppliers of computer-related training (42%). By industry, those most likely to have these links are suppliers serving the business and personal services industries (61%) and agriculture (56%), and those least likely to are those serving other primary industries (forestry, fishing, mining, 38%).

<sup>32</sup>The association of the private sector training suppliers with the public educational institutions is a recent phenomenon in Canada. In the past, the two sectors co-existed and offered different curricula.

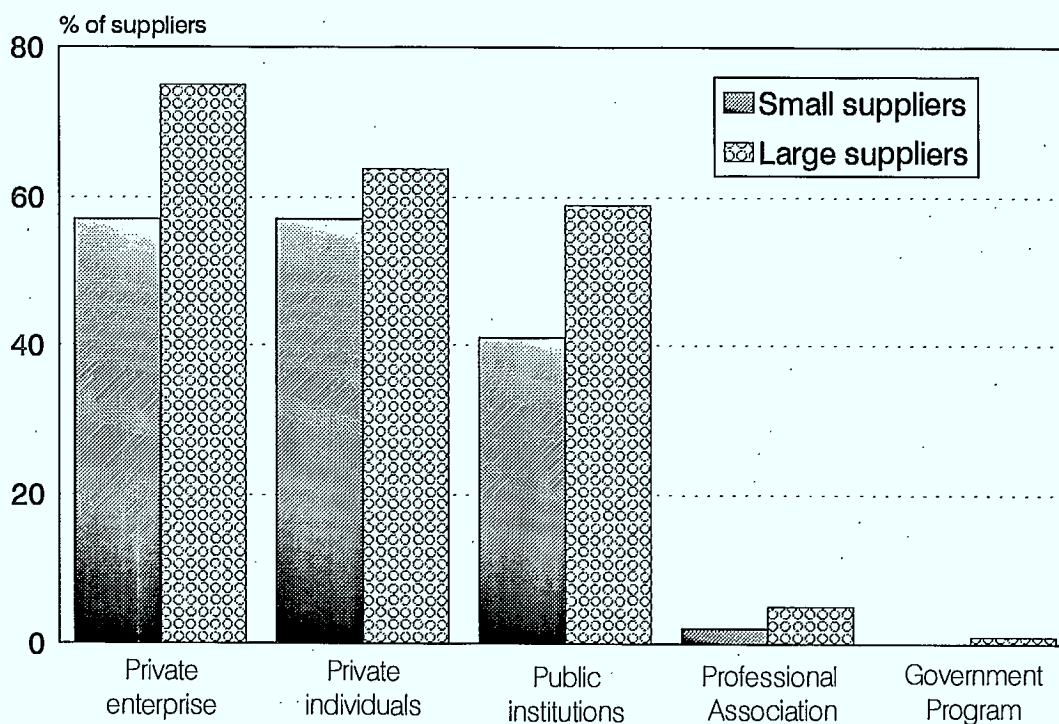
## D. Location of Instruction

### ***Most suppliers capable of providing training services to client businesses on-site***

If businesses are to provide the training and re-training of their employees that will be necessary to remain competitive in an increasingly global market, this training must of necessity be cost effective. Provision of training at a client's business premises is one of the ways to achieve this.

**Chart 4.3**

### **Percentage of suppliers forming different types of strategic partnerships, by size.**



The results of the survey show that almost 90% percent of suppliers<sup>33</sup> can provide training in the clients' workplace, emphasizing the workplace relevance

<sup>33</sup>There was no relationship between size of supplier and tendency to provide training in the workplace. Large and small firms were equally likely to do so.



of training provided by suppliers in this industry (Chart 4.4). The AETS (1990) results indicated that employers favour this type of training: the largest proportion of employer sponsored trainees (44%) took their training in-house<sup>34</sup>. On-site training has distinct advantages over off-site training for employers. Training in the workplace is generally less expensive than at an off-site location for an employer both in terms of the cost of the training itself (since it eliminates most costs incidental to training) as well as in terms of productivity losses. It probably also increases the tendency that training delivered will be relevant to work situations specific to a particular client's business. Provision of workplace training is therefore one of the major advantages this sector has over the public sector and other off-site providers in competing for the business training market and hence one of the defining characteristics of its market niche<sup>35</sup>.

Over half of the suppliers indicated that they did not provide training on their own premises. Because of the probable advantages to client businesses for training on their own premises, suppliers of commercial education and training need not necessarily even have to provide training in their own facilities in order to be competitive with other suppliers<sup>36</sup>. Suppliers in this sector are likely to be competing on the type and quality of services provided than they are on the type of facilities they can provide.

***Suppliers of computer related or professional technical training are more likely than those training in other fields to be offering training on their own premises.***

For suppliers offering computer-related training and professional technical training, the next most common location of training after the client's business location was their own facilities (61% and 55% suppliers in these fields respectively)<sup>37</sup>. For suppliers providing technical training on the integration,

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<sup>34</sup>The AETS (1990) found that 44% of employer-sponsored trainees took their program or course in-house, 34% went to an academic institution and the remaining 22% were instructed by "other" course providers.

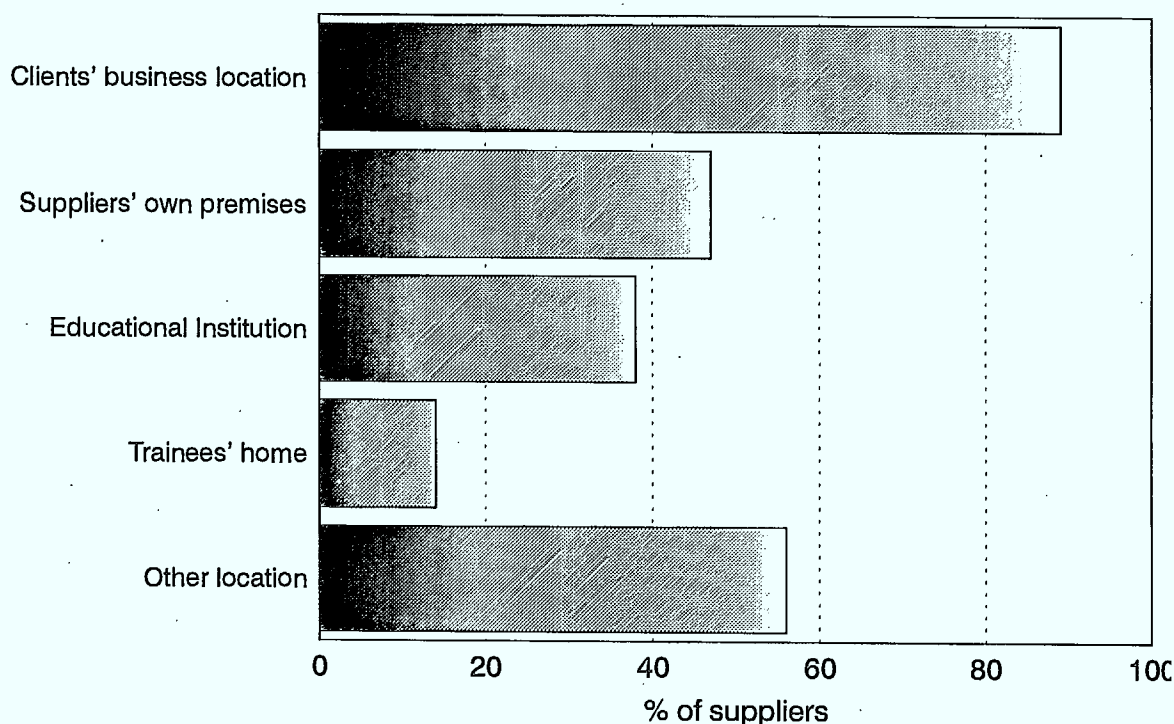
<sup>35</sup> Whatever the efforts made by the public educational institutions (or other off-site providers), they will probably have difficulty adapting to or simulating workplace conditions.

<sup>36</sup> This is one of the major reasons initial capital investment required for entry into this industry can be relatively low.

<sup>37</sup> This may not mean that these technical training suppliers actually provide much of training on their own premises, only that they are able to (especially if client preference is for training on-site). Larger suppliers, and suppliers providing training as a secondary product were much more likely to be providing training in these fields than were specialists or small firms. It may be that these suppliers are able to provide training on their own premises because they have more space and infrastructure in connection with the sale of their primary products, and/or larger numbers of staff.

Chart 4.4

**Percentage of suppliers by location of instruction.**



maintenance or repair of new equipment, it is likely necessary to possess (or to have access to) that equipment in order that they themselves will be familiar enough with it to train others (whether or not they train on the employees' premises or their own). If this is the case, in fields where rapid technological change is occurring (eg. computer), it is likely that suppliers which sell equipment themselves will continue to be more likely to provide training on it (as a secondary product) than suppliers specializing in training.

In general, those suppliers offering non-technical business-related training, such as executive/management, supervisory, sales/marketing, communications and industrial relations, were less likely than those training in technical areas to be training in their own facilities. Instead, for these suppliers, the next most likely location of instruction (after the client's business location) was a location other than their own, such as rented facilities in hotels or conference centres. In addition to reducing the amount of infrastructure required on the part of the suppliers, these temporary locations have the advantage of offering a central location to potential trainees coming from different client businesses.

Suppliers of secretarial/ clerical training are only about half as likely as suppliers in other fields to be offering on-site training (only 42% as compared to 79% or more for all other fields). In contrast to suppliers in all other fields of training, the most likely training locations for suppliers of secretarial/clerical training were their own facilities (56%) and other locations (53%)<sup>38</sup>.

Suppliers of basic remedial education were most likely to be offering training at an educational institution with whom they form strategic partnerships.

Basic remedial education and secretarial/clerical training were the fields most likely to be provided at a trainee's home by suppliers (24% and 22% of suppliers of these fields respectively).

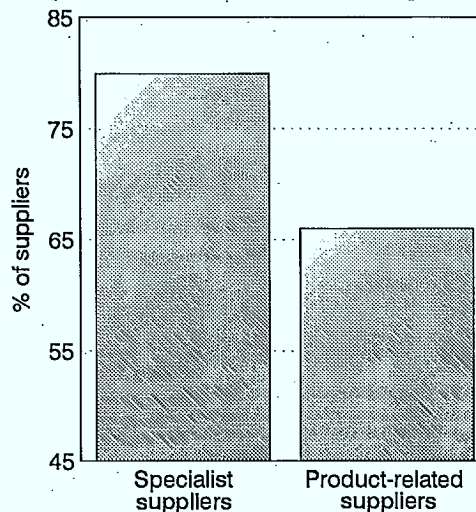
## E. Time of Instruction

***Most suppliers provide instruction both during and outside normal working hours.***

The majority of suppliers surveyed (75%) offered instruction both during and outside normal working hours. The suppliers who specialize in training are however considerably more likely to be offering instruction outside normal working hours (in addition to during them) than suppliers for which training is

**Chart 4.5**

**Percentage of suppliers providing training both during normal and outside working hours.**



<sup>38</sup>This difference is probably a result of the fact that much secretarial/clerical training in Canada has been provided by private sector suppliers which pre-date the growth of the commercial and education training sector and which have traditionally provided this training on their own premises. In addition, secretarial/clerical workers belong primarily to the secondary labour market. They may be more likely than employees in other areas to seek out off-site training on their own initiative and at their own expense in order to gain an advantage in this very competitive labour market where most positions offer little job security. (The secondary labour market is characterized by jobs with low pay, little security, and high turnover rates. The primary labour market includes professional and unionized labour).

a secondary activity (80% vs. 66%, see Chart 4.5). It seems that more *specialists* than suppliers for which training is a secondary activity are attempting to capture the market of individuals who, in order to gain advantage on the labour market, are taking business-related training on their own time (with or without sponsorship of an employer). The AETS (1990) results indicate that the portion of this market available to commercial and education suppliers is probably quite large. Twenty two percent of adults who received training in 1990 received it outside both the employer's premises and educational institutions.

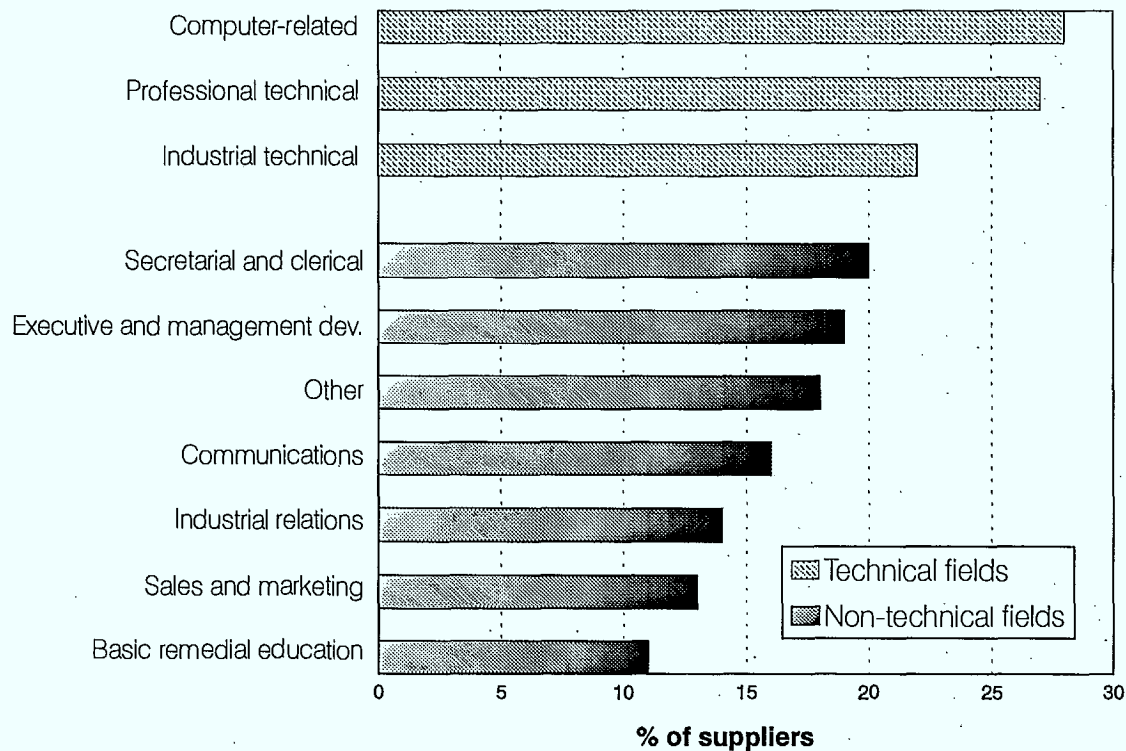
***Suppliers are less likely to offer training outside work hours if training is a secondary activity, or if they offer training in technical areas.***

Suppliers providing training as a secondary activity (*product-related* firms) were more likely to be providing training only during working hours, as are suppliers training in computer related and professional technical areas (Chart 4.6). This evidence indicates that training that is related to equipment/ services purchased for the workplace may be more likely to be delivered during work hours. This suggests that employers have a greater tendency to allow (or require) training during work hours if it is related to equipment used in production. If training is being provided on the employer's premises, training during work hours on the equipment used in production probably also reduces the cost of training for clients because it minimizes interference with production.



**Chart 4.6**

**Percentage of suppliers by field of training providing training only during work hours.**



## Conclusion

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The market for commercial education and training is growing and demand for its services is continuously changing. While education and training requirements are becoming more specialized, technical skills also become obsolete more rapidly, creating a constant need for training and re-training. The commercial education and training sector has the ability to fulfil training needs of Canadian as well as foreign businesses. This ability is reflected in the sector's capability to minimize both personal and organizational costs, to serve its customers on-site (directly or through distance education) and to easily adapt to the clients' needs. Specifically, suppliers are active at all stages of the training process, from initial identification of the training requirements to post-delivery evaluation, thus being able to supplement or substitute for a client's internal training division.

Medium and long term prospects for this sector are good. A relatively high incidence of training is required to bring the Canadian labour force at par with other countries of the OECD. According to the OECD, Canada's productivity growth is one of the lowest among major OECD countries and most researchers believe that the level of spending on training is also lagging. Moreover, as a result of recent changes in Canadian government policies, the tendency is to shift the responsibility of training from governments to employers and to put emphasis on human resource development rather than income support.

However, to be able to capitalize on these opportunities, Canadian suppliers might have to devote more resources to market their services. While the quality of services offered by the sector is highly competitive, the sector's capabilities are not always well known domestically and overseas. Moreover, the sector is facing increasing foreign competition (mainly in the area of technology-based training from the United States) and local competition from the public education sector, more specifically from the community colleges.

To expand, an aggressive marketing approach should be developed providing more exposure to the sector. An initial step towards this has already been taken with the creation of a Directory of Canadian Suppliers of Commercial Education and Training Services. The sector should also take advantage of its capacity to deliver training services on-site and form strategic partnerships with other education and training suppliers, namely the public education sector.

**Survey design.** The Commercial Education and Training Services Industry Survey was administered by The Coopers & Lybrand Consulting Group in January 1992.

The target population included all private sector organizations currently engaged in the development and delivery of education and training to business. This amounted to 3,285 establishments located in all 10 provinces as well as in the Yukon and the Northwest Territories.

Information was collected by a mail survey. Usable responses were obtained for 1,220 firms or 37.1% of the target population.

**Definition.** Commercial education and training includes the planning, delivery and evaluation of education and training programs; curriculum development and design; the identification of training needs; training counseling; and the upgrading of courses. Training related to personal care (eg. cosmetology), personal health (eg. stress management) or in basic computer skills (eg. Wordperfect, Lotus) is excluded from this definition, as is in-house training offered internally to company employees.

Firms who defined themselves as specializing only in the provision of commercial education and training services were regarded as being "specialists" in the sector. In addition, those who maintained that they undertook both forms of business (ie. they specialized as well as provided education and training to purchasers of their other products and services) and who reported that the percentage of their total revenue derived from selling commercial education and training services was more than fifty percent (over the past five years), were also included in this category. All other suppliers were referred to as "product-related" firms.

**Survey objectives.** The Commercial Education and Training Services Survey was designed to provide a comprehensive profile of the education and training services sector in Canada with emphasis on:

- a) The structure of the sector, including the typology (specialists versus product related), size (number of employees, number of clients, performance), provincial location and age of the firms.
- b) The services offered, including fields of training, language and the availability of customized programs and training related services.

- c) The market for these services, with respect to type, size, industry and occupation as well as marketing techniques.
- d) Delivery mechanisms, in terms of teaching methods, importance of technology, training delivery time and location, and strategic partnerships with outside agents such as other private companies, educational institutions or government.

**Data Limitations.** The estimates derived from this survey are based on a sample of firms. Somewhat different results would have been obtained had a complete census of commercial education and training suppliers been taken. In addition to such sampling errors, non-sampling errors may occur at various phases of a survey operation. For example, respondents may not fully understand the questions and thus answer the questions incorrectly. Or the responses may be inaccurately captured or recorded. Furthermore, total non-response may also be a source of error. In this survey, non-response occurred as a result of some respondents failing to participate in the survey. Survey results were not adjusted to compensate for those that did not respond. Finally, it was difficult to make links between some of the responses due to the fact that certain questions required the respondent to provide estimates related to more than one period of time, and in some cases, enabled multiple responses per question.

**Commercial education and training suppliers, sample size and usable responses, by province and for Canada.**

Province	Distributed questionnaires		Returned questionnaires		Completion rate
	Quantity	% Distribution	Quantity	% Distribution	
British-Columbia	181	5.51%	53	4.34%	29%
Alberta	248	7.55%	70	5.74%	28%
Saskatchewan	18	0.55%	5	0.41%	28%
Manitoba	46	1.40%	16	1.31%	35%
Ontario	1,643	50.02%	615	50.40%	37%
Québec	1,040	31.66%	414	33.90%	40%
New Brunswick	36	1.10%	15	1.23%	42%
Nova Scotia	31	0.94%	11	0.90%	35%
Prince Edward Island	16	0.49%	7	0.56%	44%
Newfoundland	15	0.46%	8	0.65%	53%
Yukon	7	0.21%	2	0.16%	29%
Northwest Territories	4	0.12%	4	0.33%	100.00%
<b>Canada</b>	<b>3,285</b>	<b>100.00%</b>	<b>1,220</b>	<b>100.00%</b>	<b>37.14%</b>