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South Africa Education Market Outlook to 2015 - Opportunities in the Online Education and Teacher Training Market

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Abstracts

The report titled “South Africa Education Market Outlook to 2015 – Opportunities in the Online Education and Teacher Training Market” provides a comprehensive analysis on various aspects such as market size of pre-primary, primary, secondary and higher education sector on the basis of learners, educators, educational institutions, total tuition fees spending. The report also entails market size of private tutoring, online education, teacher training and ICT segment and trends & developments in South Africa education system. The future projections are included to provide an insight on the prospects in the South African Education Market.

South Africa education industry offers numerous growth prospects and opportunities in terms of the increase in the number of learners, educators and educational institutions. This sector has witnessed an enrollment of ~ learners in 2010. The industry is still at a nascent stage and has a huge scope for growth. The education sector is highly controlled by the state and central governments. Total number of learners in the industry is expected to reach ~ by FY’2015 with tuition fee spending of USD ~million.

Pre-primary education is the education undertaken before entering grade R or Grade 0. Only a small proportion of children attend pre-primary schools due to diminutive provision by provinces, especially children below the age of 3 years. In 2010, Around USD ~ million was spent on pre-primary education as total tuition fees. The pre primary segment is expected to grow in the future attributed to the rising inclination of parents towards educating children from a young age.

South Africa’s primary education sector consists of Grade R to Grade 7. Grade R is the reception year of a learner which precedes Grade 1 Primary education is the largest

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sector in the South Africa education system with maximum number of learners as compared to other segments. This sector held a share of around ~% of the total learners in South Africa in 2010.

Secondary education is the second largest sector in the South African education industry with around ~ thousand learners in 2010. The Teacher-student ratio in 2010 has decreased over the period from 2005, where there was 1 teacher for around ~ students underscoring the improvement in the secondary education system in terms of teacher availability per student. There is a high dropout rate and poor academic performance in this sector.

In the long run, the secondary education segment is expected to witness growth in terms of higher tuition fee spending, increase in the number of learners, proper school infrastructure, mounting government investment and rise in the number of education companies.

The higher education sector has improved over the period with an increase of 1.02% in its market share, due to an increase in the number of higher education learners from 737 thousand in 2005. Higher education industry is mainly constituted of undergraduate and postgraduate learners with ~ thousand undergraduate learners and ~ thousand postgraduate learners in 2010.

Teacher training market is currently in an abysmal stage with a huge deficiency of trained and qualified teachers in the education system as indicated by the high teacher-student ratio in both primary and education sectors. There is a consistent poor learner performance in science and mathematics which can also be attributed to the shortage of mathematics and science teachers. ~ new teachers graduated from public higher education institutions in 2009, out of which, around ~ were Foundation Phase teachers and around ~ were FET-level teachers.

Around ~ million students take up private tuitions for primary grade subjects and around ~ million for secondary grade subjects resulting in a market size of USD ~ million and USD ~ million respectively. The total estimated market size of South Africa tutoring segment is USD ~ million.

The e-learning sector though in embryonic stage will also gain momentum with the increasing number of players entering in the industry. The growth of this sector also depends heavily on the ICT industry and internet penetration in the country. Out of the ~ million users enrolled for paid online courses in 2010, ~% are enrolled in IT skills

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courses, ~% are enrolled for business, banking and management courses and ~% learners for extracurricular online courses. The total e-learning and IT online training market in South Africa is estimated to be around USD ~ million in 2010

Key Topics Covered in the Report:

The market size of South Africa Education industry and its segments on the basis of number of learners, teachers and educational institutions and the total tuition fees spent on these respective segments.

Market Size of Online education, teacher training, private tutoring and ICT industry

Students travelling overseas for study and international students studying in South Africa.

Government spending and support for the education sector.

Market segmentation on the basis of number of learners by grade and tuition spend by category.

The trends and developments of the industry.

Future outlook and projections of number of learners and tuition fee spend in each sector.

Cause and Effect Relationship Analysis between industry factors and expected South African education industry prospects

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